



# CIM

## REVISION CARDS

## Marketing Research and Information 04/05

PROFESSIONAL DIPLOMA IN MARKETING  
2004-2005 SYLLABUS

### Key concepts for revision

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# CIM REVISION CARDS

## Marketing Research and Information

John Williams



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# PREFACE

Welcome to the CIM Revision Cards from Elsevier/Butterworth–Heinemann. We hope you will find these useful to revise for your CIM exam. The cards are designed to be used in conjunction with the CIM Coursebooks from Elsevier/Butterworth–Heinemann, and have been written specifically with revision in mind. They also serve as invaluable reviews of the complete modules, perfect for those studying via the assignment route.

- Learning outcomes at the start of each chapter identify the main points
- Key topics are summarized, helping you commit the information to memory quickly and easily
- Examination and revision tips are provided to give extra guidance when preparing for the exam
- Key diagrams are featured to aid the learning process
- The compact size ensures the cards are easily transportable, so you can revise any time, anywhere

To get the most out of your revision cards, try to look over them as frequently as you can when taking your CIM course. When read alongside the Coursebook they serve as the ideal companion to the main text. Good luck – we wish you every success with your CIM qualification

# MARKETING RESEARCH AND INFORMATION

## Unit 1

### INTRODUCTION

The Marketing Research and Information module has five major components:

- Information and research for decision-making
- Customer databases
- Marketing research in context
- Research methodologies
- Presenting and evaluating information to develop business advantage

**Syllabus Reference: 1.1–1.4**

The next few pages give an overview of the syllabus

### INFORMATION AND RESEARCH FOR DECISION-MAKING

Marketers have more information than ever before, but poor decisions and failure to meet customers' needs still occur. This element of the syllabus explores information management and the way in which organizations should determine their marketing information requirements, in order to drive profitable lasting relationships with customers. It covers the nature of the technical systems that are available to marketers to manage information and support decision-making.

## Customer Databases

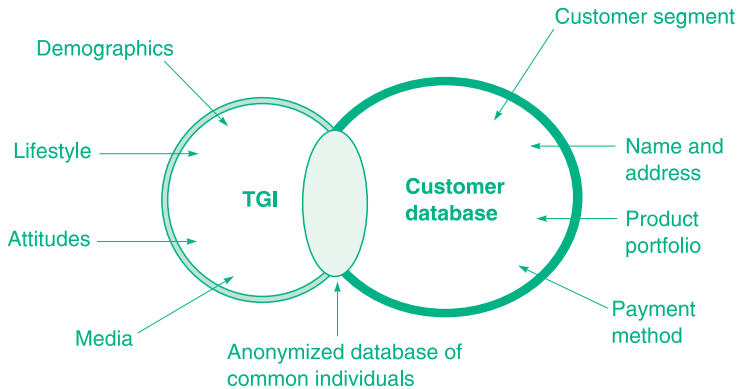
See the diagram on page 3.

**Syllabus Reference: 2.1–2.5**

### Example

#### TGI customer database

TGI is a research service run by BMRB. In this example it is run against an internal database and common characteristics identified.



The First T Process TGI and the Database. Source: Clive Humby BMRB



## Marketing Research in Context

### Syllabus Reference: 3.1–3.6

The nature, size and scope of the market research industry, including the suppliers of research services and providers of database and other information services. The stages of a research programme and the procedures and briefing of external agencies.

The ability to get the best from suppliers is a key part of the manager's job and is also true for market research. Communicating a research problem and inspiring an agency to produce a thoughtful, well-structured research plan, is crucial to the process of decision-making.

The ethical and social responsibilities of the researcher, as laid down within the codes of conduct and legislation considerations

## Research Methodologies

### Syllabus Reference: 4.1–4.6

These elements of the syllabus deal with the marketing research task and the methods that support the research process. They cover the range of methods and techniques that underpin good research design. Key capabilities include asking the right questions and using data to inform decision-making to reduce the risk to the business. Current techniques draw heavily on the internet, but there is a need to distinguish good from poor data.

The syllabus distinguishes between qualitative and quantitative research and the range of techniques that are used to gather this information; for example, questionnaires and topics guide design and delivery to support research design and analysis.

## Presenting and Evaluating Information to Develop Business Advantage

### Syllabus Reference: 5.1–5.3

This part of the syllabus looks at the evaluation and presentation of research data and conclusions. It covers the techniques that are used in the analysis of quantitative and qualitative data and the production of written research reports and oral presentations of the results. The key aim of the module is to 'provide the knowledge and skills to manage marketing information, and the more specialist knowledge and skills required to plan, undertake and present results from market research' (CIM, 2003).

### Related statements of marketing practice

These statements link the syllabus to the tasks of the marketing professional. The ones that apply to this module are:

- The evaluation of information requirements, the management of research projects and the marketing information system
- The evaluation and presentation of information for business advantage
- The ability to contribute information and ideas to the strategy process

## LEARNING OUTCOMES

➔ If you understand the learning outcomes of the module then you have a clear idea of what the examiners will be looking for in your assessment.

### Learning Outcomes and Knowledge and Skills Requirements

Learning outcomes	Knowledge and skills requirements
Identify appropriate marketing information and market research requirements for business decision-making	1.1 Demonstrate a broad appreciation of the need for information in marketing and its role in the overall marketing process
	1.2 Explain the concept of knowledge management and its importance in the knowledge-based economy
	1.3 Explain how organizations determine their marketing information requirements and the key elements of user specifications for information
	1.4 Demonstrate an understanding of marketing management support systems and their different formats and components
Plan for and manage the acquisition, storage, retrieval and reporting of information on the organization's market and customers	2.1 Demonstrate an understanding of the application, the role in CRM and the benefits of customer databases
	2.2 Describe the process for setting up a marketing database

Contd.

Learning outcomes	Knowledge and skills requirements
Explain the process involved in purchasing market research and the development of effective client supplier relationships	2.3 Explain how organizations profile customers and prospects 2.4 Explain the principles of data warehouses, data marts and data mining 2.5 Explain the relationship between database marketing and marketing research
Write a research brief to meet the requirements of an organization to support a specific plan or business decision	3.1 Describe the nature and structure of the market research industry 3.2 Explain the stages of the market research process 3.3 Describe the procedures for selecting a market research supplier 3.4 Explain the ethical and social responsibilities inherent in the market research task 3.5 Identify information requirements to support a specific business decision in an organization and develop a research brief to meet the requirements
Develop a research proposal to fulfil a given research brief	3.6 Develop a research proposal to fulfil a given research brief

Contd.

<b>Learning outcomes</b>	<b>Knowledge and skills requirements</b>
Evaluate the appropriateness of different qualitative and quantitative research methodologies to meet different research situations	4.1 Explain the uses, benefits and limitations of secondary data
	4.2 Recognize the key sources of primary and secondary data
	4.3 Describe and compare the various procedures for observing behaviour
Design and plan a research programme	4.4 Describe and compare the various methods for collecting qualitative and quantitative data
	4.5 Explain the theory and processes involved in sampling
Design a questionnaire and topic guide	4.6 Design a questionnaire and discussion guide to meet a project's research objectives
Interpret quantitative and qualitative data, and present coherent and appropriate recommendations that lead to effective marketing and business decisions	5.1 Demonstrate an ability to use techniques for analysing qualitative and quantitative data
	5.2 Write a research report aimed at supporting marketing decisions
	5.3 Plan and design an oral presentation of market research reports
	5.4 Plan and design an oral presentation of market research reports

*Source:* CIM module two syllabus

## Hints and Tips

- Show the examiner that you understand the basis of the question, by answering precisely the question asked and not including just about everything you can remember about the subject area
- Read their needs – How many points is the question asking you to address?
- Respond to the question appropriately. Is the question asking you to take on a role? If so, take on the role and answer the question with respect of the role
- Ensure the examiner has something to mark: give them substance, relevance, definitions, illustrations and demonstration of your knowledge and understanding of the subject area
- Provide a strong sense of enthusiasm and professionalism in your answers; support it with relevant up-to-date examples and apply them wherever appropriate
- Collect examples of the application of models, techniques, concepts, etc.
- Make sure that you are able to apply your learning to actual marketing situations and issues.

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# INFORMATION IN THE KNOWLEDGE ECONOMY

## Unit 2

- At the heart of successful enterprises is the effective management of information
- Integrated information is critical to effective decision-making. Advantage in the market place does not come just from carrying out research, it is about identifying, collating, understanding, analyzing and acting upon the many diverse sources of knowledge and information within an organization
- Many organizations are not organized to manage this process effectively

### KEY POINTS

- ➔ To manage information effectively, many organizations need to undergo a significant cultural change. In particular, there is a need for co-operative and collaborative attitudes towards sharing information and knowledge
- ➔ However, many find this change difficult to manage. Information may exist in silos that are not connected, leading to critical gaps in understanding



## Marketing Research (Dibb, Simkin, Pride and Ferrell, 2000)

### Collection of marketing information

Answers the questions – What, where and when are customers buying? etc.

- How do we compare with our competitors? etc.
- Why do customers respond to this form of sales promotion? etc.
- What would happen if the government introduced new legislation in this area, etc.

### Typical data: market analysis

- Market profitability
- Market growth trends
- Main products in the market
- Customer attitudes and buying behaviours
- Major competitors and market shares
- Distribution patterns
- Marketing strategies used in the market

## Typical data: product research

- New products
- Gap between current products and perception
- Consumer research
- Research from international markets
- Competitor research
- Long-range economic studies
- Satisfaction levels and trends with current products

## Typical data requirements: pricing decisions

- Competitor product prices
- Consumer attitudes to price
- What would they expect to pay?
- What would they be prepared to pay?
- Cost price volume – what quantities are likely to sell at different price levels?

## Typical data requirements: advertising and promotion

- Size of potential market
- Demographic characteristics of users
- Demographic profiles of segments
- Behaviours and attitudes of different segments
- Language used by customers in talking about product
- Share of mind compared with competitors

## Typical data requirements: sales decisions

- Sales territories
- Sales personnel efficiency
- Sales statistics
- Sales forecasts
- Sales incentives

## The knowledge age

- Huge volumes of information now available
- Managers need to be selective and systematic
- As data is drawn from multiple sources, it needs to be combined and analyzed for it to be of value

## Knowledge management

- The aim is to integrate systems and individuals to enable and encourage knowledge transfer between employees and other stakeholders.
- Knowledge involves organizing, interpreting and analyzing information to produce intelligence.
- Knowledge within organizations can take many forms:
  - ◆ Individual knowledge: resides in the mind of an individual.
  - ◆ Organizational knowledge: interactions between technologies, techniques and people.
  - ◆ Explicit knowledge: documented and shared through IT, externalized and conscious. Marketing research data is a good example of this type of knowledge.
  - ◆ Tacit knowledge: hard to codify and document because individuals often take for granted what they know and how they do things. It can be difficult to communicate what they know in a form that others can use effectively.

## The Structure of an Information System

### Technology infrastructure

Hardware

Systems software

Applications

Software

Communications

### Data infrastructure

Databases

Database management

Archiving communication

### Personnel

Technology developers

Systems operators

Systems maintainers

Users

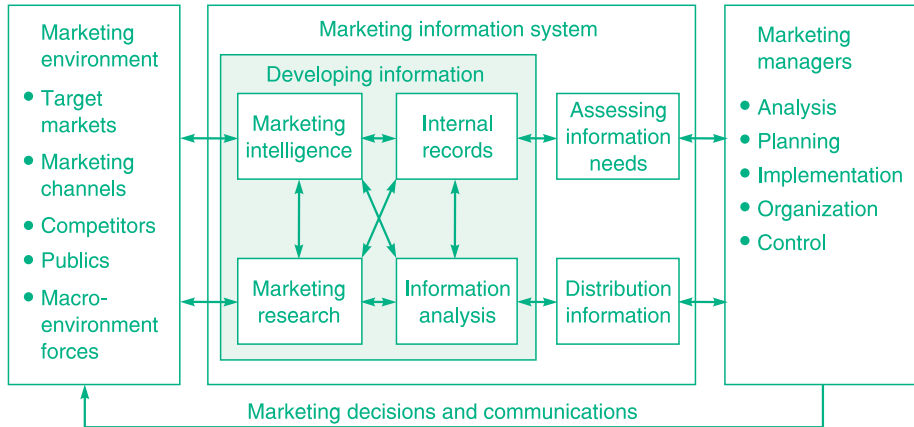
User support

## Marketing management support systems – The marketing information system (MKIS)

This is a system in an organization that supplies information, communication services and resources to meet organizational needs. The MkIS is the system used to put information at the heart of the decision-making process. A typical MkIS consists of four elements:

- The marketing research system is the backbone of the marketing information system
- The marketing intelligence system – published data existing in the market place
- The decision support system – contains the tools needed to make sense of data
- Internal records – includes e.g. sales and accounts records, details on past communications and the results of previous marketing research

## The Marketing Information System (MkIS)



## What is Marketing Research?

The Market Research Society (MRS) defines it as 'the collection and analysis of data from a sample of individuals or organizations relating to their characteristics, behaviour, attitudes, opinions or possessions. It includes all forms of marketing and social research, such as consumer and industrial surveys, psychological investigations, observational and panel studies' (MRS, 1999)

Marketing research is the function that links the consumer, customer and public to the marketer through information. . . it specifies the information required to address these issues, designs the method for collecting information, manages and implements the data collection process, analyses the results, and communicates the findings and their implications (American Marketing Association, 2003)

Market research is a subset of marketing research. Market research refers to research on markets, whereas marketing research covers the broad scope of marketing activity



## Databases

A database does not have to be computer-based but access to database technology is easy and cheap. A database will collect data about past, potential and current customers. A database differs from an accounting system in that the data must be relevant to marketing decision-making. It is important that data fed into the marketing database is relevant to marketing decisions, now and in the future.

Wilson (2003) suggests that marketers develop customer databases for four reasons:

1. To personalize marketing communications
2. To improve customer service
3. To understand customer behaviour
4. To assess the effectiveness of the organization's marketing and service activities.

## Worldwide Expenditure on Marketing Research 2001. Source: ESOMAR

	Turnover* 2001		% Distribution	% Increase 2001/000	
	US\$ million	Euros million		US\$	Euros
World total	15 890	17 756	100	2.8	5.8
Europe	6316	7058	40	4	7.1
EU 15	5842	6528	37	4.2	7.3
North America	6577	7349	41	3.3	6.3
USA	6159	6882	39	4	7.1
Central/S. America	775	866	5	3.3	6.4
Asia Pacific	2027	2265	13	(-4.8)	(-2.0)
Japan	1070	1196	7	(-11.3)	(-8.6)
M. East and Africa	195	218	1	n/a	n/a

\*Based on average exchange rates: 2000: 1 EURO = \$US 0.9213; 2001: 1 EURO = \$US 0.8949.  
(Source: IMF International Financial Statistics May 2002)

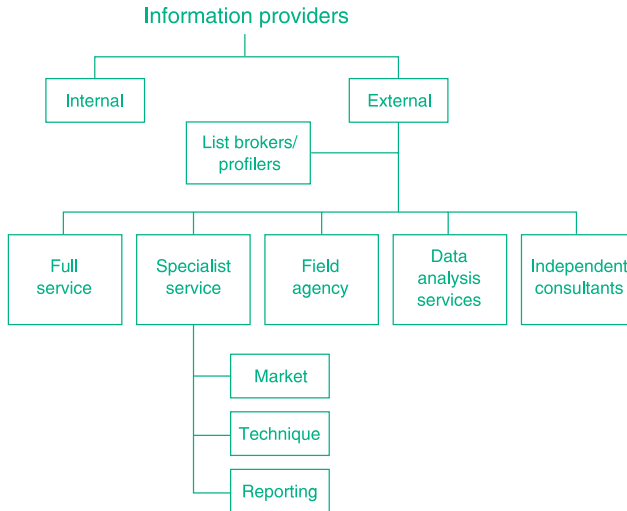
NB: The estimates are not adjusted for inflation.

## Who Carries out Research?

Alan Wilson (2003) identifies the following:

- List brokers – Suppliers of lists of contacts for marketing purposes. They may include names and addresses, telephone numbers and e-mail addresses
- Full service agencies – Agencies that provide a full range of research services, e.g. TN Sofres
- Specialist service agencies – Specialize in certain types of research, e.g. international research or online research
- Field agencies – Specialize in the delivery of fieldwork and administration of questionnaires
- Data analysis companies – Specialize in the analysis of data
- Consultants – Independent consultants who may offer a range of services
- Other suppliers to the industry include database bureaux who may host an external database

## Who Carries out Research?



Leading global research companies carry out research using a variety of research techniques. The table shows the split between techniques.

Type of research	%
Face-to-face interviews	32.9
Telephone interviews	19.5
Discussion groups	8.8
Consumer panels	8.3
Postal/self-completion	8.0
Hall/central location test	7.7
Retail audits	4.5
In-depth interviews	3.6
Street interviews	2.0
Observation	0.3
Web/Internet interview	0.2

Percent Research Turnover by Method 2002. Source: BMRA (2002)

### Internal secondary research: sources

- Sales figures
- Operational data – stock levels, etc.
- Customer satisfaction results
- Advertising spend
- Customer complaints records
- Effectiveness data from promotional campaigns
- Marketing research reports from past studies

### External secondary research: sources

- Internet – single search engines and multiple search engines
- Directories
- Country information
- Published marketing research reports
- News sources and discussion lists

## **Ethics, regulation and codes of practice in market research**

The 'data' industry has grown rapidly as the technology that is available to capture, store analyze and exchange data has improved. The amount of data held on individuals is vast and increasing. This raises many issues

### **Data protection**

The UK Data Protection Act regulates 'processing' of data; this covers data on any living person and there are separate rules for sensitive data. The guiding principles in the Act are transparency and consent. Individuals must have a clear understanding of why their data is being captured and what it will be used for, and they must consent to its use and be given the opportunity to opt out of any later use of this data

### **Codes of practice**

Not legally binding but do represent good practice, and members of the professional bodies must comply with the code of conduct. The MRS code of conduct is available at [www.mrs.org.uk](http://www.mrs.org.uk). You should download this and add it to your study materials

## Hints and Tips

- The marketing information system provides a useful way of storing information and making sense of it
- Information is available in vast quantities and managers need to be able to select what is and is not useful. The problem is not so much accessing information, but analyzing it effectively and efficiently to produce actionable intelligence
- Database systems are not just useful in storing and analyzing customer information, but can play a part in helping to organize marketing information needs
- Competitive intelligence is a specific form of Market Intelligence. This is often undertaken on an on-going basis and involves the collection of news, materials and other information about competitors from a wide variety of sources. Competitive intelligence is more about putting structures in place than specifically finding one-off pieces of data
- Don't overlook knowledge about customers, markets and competitors that comes from staff. Often this is a poorly tapped source of information. Collecting and disseminating such information falls into the realms of customer knowledge management and making better use of customer knowledge can help businesses focus on what the customer wants and says

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance



# THE MARKETING DATABASE

A circular badge with a teal background and a white border, containing the text "Unit 3" in white.

## Unit 3

**Syllabus Reference: 2.1–2.5**

After completing this unit you will:

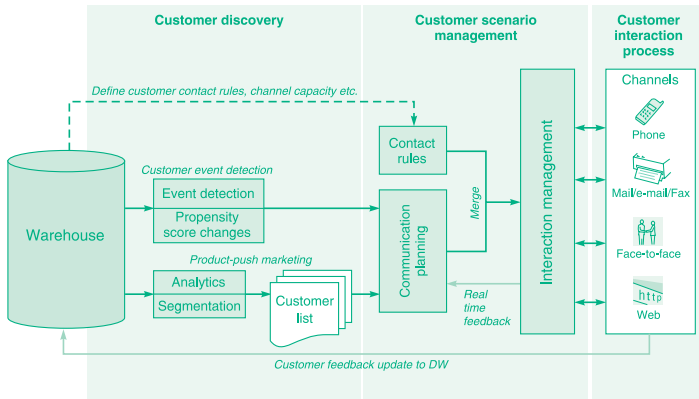
- Be able to define the marketing database and its role within Customer Relationship Management systems
- Understand the marketing applications supported by the marketing database
- Understand the management process involved in building, maintaining and enhancing the database
- Understand and define the concepts of data warehouses and data mining

## Key definitions

Attributed data	Data that is extrapolated from the results of market research
Behavioural data	Data that is derived directly from the behaviour of the customer
Data capture	Information taken on to a computer system
De-duplication	System of removing names and addresses which appear in a list more than once
Geo-demographics	Companies supply a system of categorizing the country into a number of different demographic types. Each postcode in the country is assigned one of these types. This means that each customer on a database can be matched to a demographic type. When this is done across customer records, a demographic profile emerges
Golden fields	The key information elements of the database that must be completed and maintained for good database marketing
Lifestyle data	Lifestyle companies collect information on customers' lifestyles. The data is assembled from various sources; guarantee cards filled in, in return for an extended warranty
OLAP	On Line Analytical Processing
Profile data	Data that is obtained by linking the database with other sources of information
Volunteered data	Data that is given up by the customer through, e.g., registering on a website

## Customer relationship management

CRM is an integrated approach to identifying, acquiring, and retaining customers. It enables organizations to manage and coordinate customer interactions across multiple channels, departments, lines of business, and geographically.



CRM and Data Warehousing. Source: Teradata

## The Process of Setting Up a Marketing Database

The process of setting up a database is complex and demanding.

### Stages

- Business review
- Data audit
- Data strategy, specification and verification
- Data verification
- Hardware/software
- Data capture, maintenance and enhancement
- Management issues – should the database be run in-house/out-house
- Applications
- Review

## Business Review

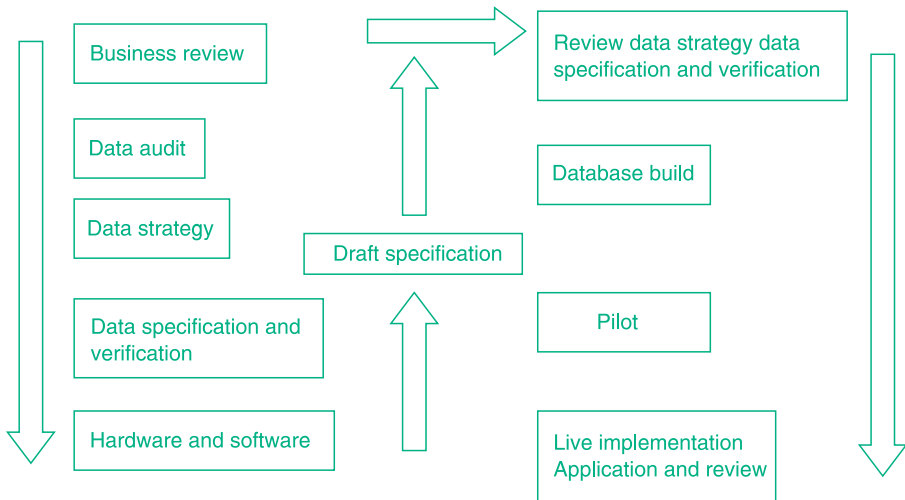
All business decisions should begin with an understanding of the strategic direction of the business. The following questions need to be asked:

- How will data help the business achieve its business and marketing objectives?
- Where will the business be in 10 years' time?
- What media, information and technology changes will need to be built into the system?
- What business processes will the database support?
- How will the database be accessed?

## The Data Audit

The following needs to be established:

- What information requirements does the organization have now and in the future?
- Where is this information held currently?
- How is this information currently used?
- How will it be used in future?
- Which departments and individuals need access to this information?
- If information is not available, where does it come from?
- Who will enter the data and ensure that it is accurate and complete?
- What applications will this information support?
- How does the proposed system integrate with existing information management systems?



## The Database Development Process

## Review of strategy and data audit

The review of strategy and the data audit should result in a long-term strategy for data within the organization. This should be capable of evolution and development over time as the markets served by the organization, and the organization itself, changes. The strategy should specify the information that is required by the organization, outlining where the information is available and what additional data is to be acquired and managed.

It should determine the following:

- Who and what departments are able to use and update data held on the database?
- How will the data be kept up to date and who is responsible for this?
- What data verification rules will be put in place to ensure quality and completeness?
- What analysis systems will the database support?
- Is there in-house expertise?
- Support offered
- Analysis systems support
- Maintenance costs
- Data capture, maintenance and enhancement
- Management issues – should the database be run in-house/out-of-house?

## Profiling

Because of the range of information that is captured on customers, quite sophisticated profiles can be created. By linking a data base to services like Mosaic, the profile can be extended significantly. Simple profiling might be used to identify the best value customers, according to certain demographic or lifestyle indicators. This would be based on the value of past purchases, how often they purchased, and when they last purchased. This is known as recency, frequency and value analysis, or RFV analysis. It is also written as FRAC analysis (Frequency Recency Amount and Category). By matching this to other data, e.g. income, family status and postcode, people with similar profiles can be targeted.



## Using the Database to Profile Customers

### The data warehouse and data marts

There is an important difference between the database, data marts and data warehouses. In many ways they are different levels of the same thing – the range of data held on customers and marketing and other activities within an organization. A data mart is a collection of databases that may serve a particular purpose. These tend to be expensive to maintain as they duplicate information. Data warehouses are created to form a single view of the ‘truth’ for the organization as a whole and consolidate data marts.

The creation of data warehousing may involve a complex reorganization of business processes.

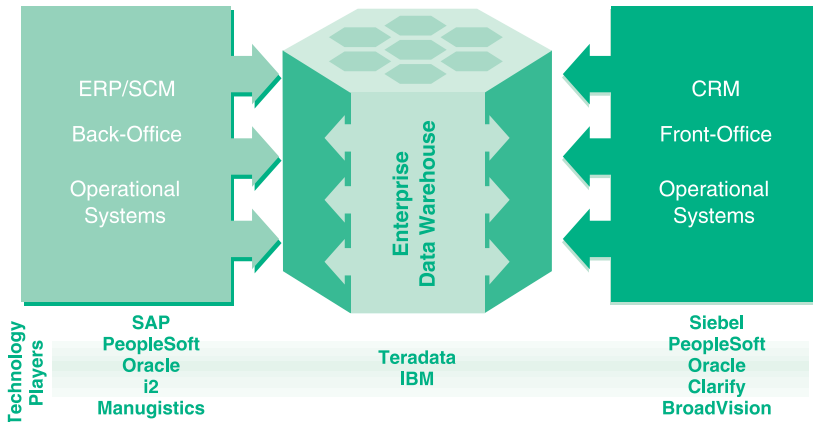
Geo-demographic and lifestyle profiling. Data can be enhanced through overlaying bought-in data. Data can be bought from, e.g., Experian, who runs the Mosaic system, CACI, who runs ACORN and Claritas, who runs a number of lifestyle overlays.

Visit the following websites:

[www.experian.com](http://www.experian.com)

[www.claritas.co.uk](http://www.claritas.co.uk)

[www.caci.co.uk](http://www.caci.co.uk)



Data Warehouses Combine Datamarts. Source: Teradata

## Data mining

- Data mining is the process of analyzing the database or the data warehouse to extract meaningful and actionable information. Antinou defines it as ‘the process of extracting hidden and actionable information for large databases’ (Antinou, T., 1997)
- Data mining software can help this process. It includes the process of statistical analysis of data or simple counts. It also includes a range of tools to help analyze the database. These are known as online analytical processing, or OLAP. OLAP tools allow for queries to be made of data, e.g., counts of the number of people of a certain age who bought a particular product. These tools allow the database to be interrogated

## Marketing applications of the database include:

- Find Prevent inactivity
- Up sell Cross sell
- Renew
- Acquire
- Keep

## Hints and Tips

- Thomas and Housden's book *Direct Marketing in Practice* contains a useful chapter on the database and its applications
  - Technology has enabled the development of the database into a powerful tool for the management of customer information
  - It is essential that any database is kept up-to-date through regular 'cleaning', or customer relationships can be damaged rather than enhanced
  - Customer databases provide information on purchase behaviour, customer loyalty and customer response, but they only describe 'what' and not 'why'
  - A data warehouse is a large database, storing transactional data and enabling insightful analysis
  - Data mining selects, explores and models large amounts of data to uncover previously unknown relationships and patterns
  - Marketing research should be transparent about database usage and should not be used to 'sell' to respondents
  - Much marketing intelligence information can come from making better use of existing information. For instance, by carrying out database analysis on orders taken, it may be possible to understand where there are cross-sale and up-sale opportunities, or to understand what type of customers are the most profitable
- Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# THE MARKETING RESEARCH PROCESS

A circular badge with a teal background and a white border, containing the text 'Unit 4' in white.

## Unit 4

**Syllabus Reference: 3.2–3.6**

After completing this unit you will:

- Be able to identify the stages of a marketing research plan
- Identify and brief a range of marketing research suppliers
- Be able to construct a proposal document in response to a marketing research brief

## Key definitions

- Primary research – Research carried out for the first time with participants
- Secondary research – Published research or research carried out for some other purpose
- Experimental research – Research measuring causality, or the changing of one variable to observe the effect on another, whilst other extraneous variables are kept constant
- Coding – The process of allocating codes to responses collected during fieldwork, facilitating analysis of data (MRS, 2003)
- Exploratory research – Research intended to develop initial ideas or insights and to provide direction for any further research
- Fieldwork – The collection of primary data from external sources by means of surveys, observation and experiment
- Longitudinal research – Data collection over time to examine trends.
- Causal research – Research that examines whether one variable causes or determines the value of another variable
- Descriptive research – Research studies that describe what's happening in a market without potentially explaining why it is happening
- Observation research – A non-verbal means of obtaining primary data as an alternative or complement to questioning

## The Marketing Research Plan

1. Review the business situation
  2. Define the marketing issue or problem
  3. Carry out exploratory research
  4. Previous research
  5. Internal research
  6. Redefine the problem
7. Brief issued
  8. Agency selected
  9. Research design
  10. Desk research
  11. Primary research
    - Qualitative
    - Quantitative
12. Pilot
  13. Fieldwork
  14. Data input coding and editing
  15. Data analysis
  16. Results
  17. Findings and recommendations
  18. Report/presentation
  19. Decision

## Review the Business Situation

Start the process with a review of the current business position. Restating the values and mission of the business, identifying markets served and a unique selling proposition helps to focus the research process on the broader goals of the business. It may help to state the marketing objectives of the business and summarize the current marketing plan, which should provide the underpinning for all activities.

- Marketing decisions need to be made in response to a constantly changing business environment and research may be needed to inform these decisions
- The review of the business environment is an ongoing process and research requirements may reflect the dynamic nature of this environment
- Environmental scanning may be the responsibility of the research department
- The business case needs to be established, as resources within the marketing function are always under pressure. The research proposed needs to be fully informed by the business situation and an assessment of relative costs and benefits



## Defining the Issues or Problem

Poor problem definition can lead to expensive and unnecessary work being carried out. Exploratory research should clarify the research problem. It is largely informal and may involve a range of techniques. It should involve discussions with those who are involved with the problem and its solution. The aim is to inform the process and to become 'immersed' in the problem and its potential solutions. An understanding of the commercial constraints of carrying out research needs to be worked out. It is incumbent on the person making the business case to clarify the assumptions that they are making and explaining the rationale that will lead to increased sales. This information is needed for critical internal scrutiny

## Internal Research

This should be reviewed to see if the problem has been dealt with elsewhere. It may be that the solution lies in the work that has been done in other departments. Internal research will involve the use of the MkIS and the database. It may be that the problem can be solved at this stage.

## Redefine the Problem

The output of this stage is a clear statement of the research problem that is agreed by all parties. After this, a brief can be written.

## Research Design

Wilson identifies three types of marketing research. These are:

1. Exploratory
2. Conclusive – descriptive research
3. Conclusive – causal research

Whilst these are not mutually exclusive, they represent a continuum, from purely descriptive to the causal.

## Desk Research

Desk or secondary research is information that has already been gathered for some other purpose. It is usually accessible from a desk via the Intranet, online, or in hard copy.

## Primary Research

Primary research is 'new to the world research'. It uses methods such as telephone research, face-to-face interviews, or online research.

## Quantitative Research

Quantitative research provides answers to the questions 'who' and 'how many', rather than the depth of insight as to 'why'. It uses a structured approach to problem-solving, using a sample of the population to make statistically based assumptions about the behaviour of the population as a whole. Quantitative research is usually gathered and recorded via a questionnaire. It can be delivered via a number of different media, including face-to-face, telephone, mail, or online.

## The Pilot

Research should be piloted or tested to check that the data collection methods are sound. Pilots will help with the structure and sequencing of questions and may identify areas of questioning that have not been considered

## Fieldwork

Fieldwork covers the collection of observational, quantitative and qualitative data. The administration of a major study may involve serious logistical considerations. The management of fieldwork is often given to specialist field managers or fieldwork agencies. The process is important, as failure to adhere to the correct methodology at this stage may compromise the entire project

**Data input, coding and editing** – Data gathered from respondents must be recorded and edited to produce a data set that can be analyzed. In qualitative work, this may be transcripts of interviews. In quantitative work, data can be input straight into the computer via:

- Computer-aided telephone interviewing (CATI)
- Computer-aided personal interviewing (CAPI)
- Computer-aided web interviewing (CAWI)

**Data analysis** – Data is analyzed via the computer to produce a range of results.

**Results, findings and recommendations** – Results should be presented clearly in a way that focuses on the problem to be solved. They should be presented in a way that is accessible to the audience and that clearly presents the solution to the problem posed.

**Report/presentation** – Presentation of the results will usually be in the form of a written report and this may be supported by an oral presentation. The data will need to be presented, but this should be in the appendices. The body of the report remains solutions-focused.

**Decision** – The output should be marketing decisions that are made at reduced risk and a feedback loop should exist to the business situation.

## The Marketing Research Brief

- The briefing document is perhaps the most important stage of the research process.
- A tight brief is vital to the management of the marketing research process. It provides a focus for discussion and a guiding hand through the project.
- Some research briefs are given on one side of an A4 page. This may be sufficient but may be adequate for complex multifaceted research tasks.
- The best marketing solutions come through cooperation and active involvement.
- The development of the brief should be a team activity.

## Short Listing

Once the brief is written and agreed, it should be sent to a short list of agencies. The short list generally should be no longer than four. Occasionally, more than four agencies are asked to pitch. It is courteous to let the agencies know how many other companies they are up against. Clients should not normally invite more than four agencies to tender in writing for a project. Unless paid for by the client, a specification for a project drawn-up by one research agency is the property of that agency and may not be passed on to another agency without the permission of the originating research agency.

**The proposal** – The proposal should be presented in a written format and on time. A formal presentation may accompany it.

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*Identification data*

Key contact details, title and data.

*Situation analysis*

An outline of the current business position.

*Research objectives*

A clear statement of the purposes of the research.

*Methodology and rationale*

Crouch and Housden (Crouch, S. and Housden, M., 2003) suggest that the following type of questions should be answered:

- Why use the sample selection procedure indicated?
  - Why use the size of sample indicated?
  - Why the personal interview technique rather than group discussion?
  - Why a 20-minute questionnaire and not a 30-minute questionnaire?
  - Why are open-ended questions requiring expensive coding and analysis being included in a large-scale quantitative survey?
  - Why is a written report or verbal presentation included, or why not?
  - Why the timetable indicated?
  - Why is the cost indicated?
- 

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*Sample*

A precise definition of the sample to be selected and a justification of this.

*Fieldwork*

What data collection methods are proposed?

*Questionnaire/topic guide*

It is unreasonable to expect a final questionnaire but an indication of what the agency expects to see in the questionnaire should be provided.

*Data handling and processing*

How will data be captured, edited, coded and analyzed? What tables will be provided?  
How will the data be presented?

*Reporting*

What is included in the cost?

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*Timetable*

A full detailed timetable of research activity and key milestones.

*Costs*

What is included? Is VAT included? How long is the quote valid? Terms of business and payment schedule.

*CVs of key staff*

Are people who are presenting the people you will be dealing with? What is their experience? What professional memberships do they have?

*Supporting evidence*

Is the agency a member of professional bodies? Are references provided?  
Contract details: the proposal will generally form the contract on acceptance.

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## Selecting the Agency

Wilson (2003) identifies a checklist of seven points:

1. The agency's ability to understand the brief and translate it into a comprehensive proposal
2. The compatibility of agency and client teams. Can we work with them?
3. The evidence of innovation in the proposal. Has the agency added value?
4. Evidence of understanding of the market and the problem facing the organization
5. Sound methodology
6. Meeting budget and time scales
7. Relevant experience

## Managing the Agency Relationship

(Baker, S. and Mouncey, P., 2003)

- ◆ Get involved with the marketing team
- ◆ Anticipate research opportunities
- ◆ Develop research tools that relate to the commercial issues the company and its clients face
- ◆ Deliver research more effectively and more efficiently
- ◆ Investigate opportunities to deliver research 'online'
- ◆ Encourage informal contact with users
- ◆ 'Educate' senior management about the value of research to the business
- ◆ Be intellectually attuned to your key clients' needs

## International Research

Proctor (2003) suggests four different approaches to carrying out international research

- Using own staff or importing agents – problems here may be due to lack of impartiality and lack of skills
- Using overseas agencies – selection may be difficult, but they should possess knowledge of their home markets
- Using a UK-based firm supported by locally based researchers – this offers few advantages over the above
- Using a consortium of agencies – problems here include variability between agencies.

Recruiting international agencies should be straightforward, but there are a range of additional complexities involved. For example, language and cultural differences need to be recognized and built into research design.

## In-house or out-of-house research ?

In-house has a range of advantages:

- Control of the research process rests with those who commissioned the work
- Awareness of the market or sector dynamics
- Knowledge of both methodology and results resides within the organization – cumulative knowledge
- Costs – it may be cheaper to manage the tasks in-house
- Timing – it may be quicker to produce results

Disadvantages include:

- Lack of skills or methodological expertise
- Inability to provide true national or international coverage
- Bias in terms of interpreting the result from a predetermined point of view

**Advantages** of using an agency include

- Penalty clauses in contracts can protect the commissioning party
- MRS code of conduct or other industry quality control standards will ensure the integrity of data
- There is no political element to the research

**Disadvantages**

- Conflict of interest with other clients
- Lack of industry expertise
- Allocation of junior staff to smaller projects

## Evaluating Existing Research

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### **A scheme for judging research quality**

#### **1. What were the objectives of the research?**

Are they appropriate to the problem to which the findings are now to be applied?

#### **2. What method was used to collect the information?**

Is it appropriate to the information needed?

#### **3. Who was asked the questions?**

Is the sample definition appropriate?

#### **4. How many people were asked?**

Is the sample size adequate?

#### **5. What were the actual questions?**

Check the copy of the questionnaire in the technical appendix. Do they seem to be good questions – well framed and appropriate to the objectives?

#### **6. Who did the fieldwork?**

Is there a basis for judging the quality of the fieldwork? Were professional interviewers used? What checking procedures were used?

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Contd.

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**7. When was the fieldwork carried out?**

Was the timing sufficiently recent for the results still to hold? Was the time of year/time of day appropriate?

**8. Are the tabulations comprehensible?**

Are they legible, with clear headings, and indexed?

**9. Would further cross-tabulations produce useful information?**

Are these possible?

**10. Is the report in a logical order and readable?**

Does it make sense?

**11. Is there a meaningful summary?**

Is it easy to grasp the main points being made?

**12. Are there conclusions? (if appropriate)**

Are they supported by the data?

**13. Did the research meet its objectives, and if not, why not?**

Does this invalidate the research?

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A Scheme for Judging Research Quality. Source: Crouch and Housden 2003



## Hints and Tips

- The market research industry is made up of full service agencies, specialist service agencies, field agencies, data analysis services and independent consultants
- The industry is self-regulated by professional bodies such as the Market Research Society
- External suppliers can be useful as they may be more objective, have specialist skills, specialist facilities and experience in the specific market/topic
- Base selection on experience, technical expertise, resources, reputation, communication skills and length of time in industry
- The research proposal is the most important of the whole research project. The proposal is based on the brief given and provides a template and contract for the project
- The process of defining the initial research problem can be helped by internal and exploratory research. The use of research should be justified, where possible, by examining the cost of making a poor marketing decision, compared to the anticipated profit from making a better marketing decision
- Start with the cheapest sources of information; that is, secondary or desk research. If this does not produce the required information, then primary research should be considered
- Qualitative work should precede and inform the development and use of quantitative methods

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# USING SECONDARY RESEARCH

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## Unit 5

**Syllabus Reference: 4.1, 4.2**

On completing this unit you will be able:

- To define secondary marketing research
- To explain types of secondary data
- To understand where to find secondary data
- To understand the limitations and strengths of secondary research
- To look for data online
- To understand the applications of secondary research

## Key Definitions

- External data – Data that is held by external organizations
- Internet – A network of computers
- World Wide Web – An Internet protocol supervised by the world wide web consortium at [www.w3.org](http://www.w3.org)
- Intranet – A closed private company network based on web technology
- Extranet – A process that shares information from internal sources with selected external organizations
- Search engines – Internet-based tools for searching for Uniform Resource Location (URL) or web addresses
- Newsgroups – Web-based bulletin board services
- Chat rooms – Locations on the Internet enabling web-based text or video-based real time interaction
- ISP – Internet service provider

Crouch and Housden (Crouch, S. and Housden, M., 2003) define secondary desk research as ‘data that has already been published by someone else, at some other time period, usually for some other reason than the present researcher has in mind. The researcher is therefore a secondary user of already existing data which can be obtained and worked on at a desk’

## The strengths and weaknesses of secondary data

### Strengths

- It is cheap or free of charge. Costs vary, but very often a full report on markets or market sectors can be put together very quickly and cheaply.
- It may provide an answer to the problem – this will save enormous time and effort.
- It can guide or provide direction for primary work.
- It can suggest methodologies for data collection.
- It can indicate problems with particular methodologies.
- It can provide historic or comparative data to enable longitudinal studies.

## Weaknesses

- It is not related to the research question and the temptation may be to force the data to fit the question.
- It may not be directly comparable. This is particularly the case in international markets where markets may be defined differently.
- Data may be incomplete.
- It may not be available. It may be that there are certain markets that are not adequately covered.
- The data may have been gathered for a particular purpose. Production statistics in certain markets are unreliable. Data may be presented to portray a company or government in a more favourable light.
- Data for international markets may be more expensive and unreliable.
- Data for international markets may be in a foreign language. Translating costs in business markets are expensive.
- Time series data may be interrupted by definition changes, e.g., in the way inflation is calculated.

Both Wilson (2003) and Crouch and Housden (2003) have significant resources outlined in the relevant chapters.

## Evaluating secondary data

When looking at published research reports, the user should ask the following questions:

- Who published the study? Was it a national government? Was it a trade association?
- What is the nature of the organization? Is the publisher of the data the same as the organization that collected the data?
- For what purpose? Is the study designed to sell a service? Is it designed to counter negative publicity? Is it designed to generate publicity?
- When was the data gathered? Is it relevant?
- How was the data collected? Was the data capture mechanism reliable? Was it a self-selecting sample?
- Who collected the data? Are they independent? Are they trained? Are they members of a professional body? What sample was used?
- How reliable is the data?
- Is raw data presented?
- Can I replicate the study? Is the methodology included? Can I test the data for accuracy?
- Is the data comparable?

## Hints and Tips

- Both Wilson (Wilson, A., 2003) and Crouch and Housden (Crouch, S. and Housden, M., 2003) have significant resources outlined in the relevant chapters. You should scan these chapters and add relevant websites to your list of favourites
- Secondary data is information that has been previously gathered for some purpose other than the current project. It helps to clarify the requirements, enables more insightful interpretation of primary data, provides comparative data, and provides information that cannot be obtained through primary research
- Secondary data is faster and less expensive to collect – the Internet has improved this still further, but its limitations include availability, applicability, accuracy and comparability and its use should be evaluated before going ahead

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# OBSERVATION RESEARCH

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## Unit 6

### Syllabus Reference:

After completing this unit you will be able to:

- Define observational research
- Understand the methods of observational research
- Understand and define the role of audits in marketing research
- Understand the application of mystery shopping techniques
- Identify online observation techniques
- Outline the ethical issues in observational research

### Key definition

- Observation – A non-verbal means of obtaining primary data as an alternative or complement to questioning (MRS, 2003).
- Panels – A permanent representative sample, maintained by a market research agency, from which information is obtained on more than one occasion, either for continuous research or for ad hoc projects (MRS, 2003).

Contd.



- Audit – The measurement of product volume and value through the distribution network. Audit may be wholesale, retail or consumer.
- Mystery shopping – The use of individuals trained to observe, experience and measure the customer service process, by acting as a prospective customer and undertaking a series of predetermined tasks (MRS, 1997).
- Peoplemeter – The mechanical device used by BARB to collect data on TV audiences in the UK.
- EPOS – Electronic Point Of Sale equipment.
- Cookies – A file stored on your hard drive, used to identify your computer and other information, including preferences to another remote computer.
- Ethnographic research – Observation involving total immersion in the life of the subject.

### Definitions of observation research

The MRS defines observation as ‘A non-verbal means of obtaining primary data as an alternative or complement to questioning’ (MRS, 2003). Wilson defines it as ‘a data gathering approach where information on the behaviour of people, objects and organizations is collected without any questions being asked of the participant’ (Wilson, A., 2003)

## Observation strengths

- It is not dependent on the respondent's memory. It records exactly what has happened, not what the respondent believes has happened.
- The potential for bias in research may be reduced, as the researcher is the witness of behaviour rather than actively asking for information – the way an interviewer asks for information can influence responses.
- Mechanical recording of observed behaviour may reduce the incidence of reporting errors.
- Observation does not rely on the verbal skills of a respondent to describe the behaviour.
- Observation measures what has happened, not what respondents say that they will do in a certain situation.
- Observation can counter the high refusal rates in some markets.
- Observation can be used to monitor behaviour preceding an action, e.g., picking up and looking at competing products before making a final decision.
- Observation does not interfere with the respondents' day-to-day life. It is their activity that is of interest. They do not have to fill in diaries or complete questionnaires.

## Disadvantages

- Observation does not measure the reasons for certain behaviour. It cannot uncover motivation or attitudes.
- Observation cannot measure the likelihood of repeat behaviour.
- Only public behaviour can be assessed. Private behaviour is very difficult to research in this way, although efforts have been made to manage this process.

## Observation methodologies

There are a range of observational techniques that are used throughout the research industry.

## Audits and scanner-based observation

An audit measures product movement and consumption through the value chain.

There are three types of audit – wholesale, retail and home. The use of Electronic Point Of Sale (EPOS) and hand-held scanning devices has changed this sector of the market significantly over the last 10 years.

Audits have been in place for some time, but the process of carrying them out was far more time consuming than it is today. The use of EPOS technology has significantly reduced the amount of time taken to produce results. Audit data can produce a huge range of analysis, and the services of AC Nielsen and TN Sofres provide the raw material for the marketing management of the retail and grocery marketing sector. The data includes:

- Market share
- Brand share
- Brand loyalty
- Category loyalty
- Retail sector analysis
- Retail share
- Retail price checks
- Average basket
- Sales promotion responses, etc.

## Media measurement

The measurement of media is a key element of observation research. The most important is the Broadcaster's Audience Research Board (BARB), which provides the measurement service for television viewing in the UK. Other media are audited in different ways – some are based on observation, some on other research methods.

## Mystery shopping

The use of individuals trained to observe, experience and measure the customer service process, by acting as a prospective customer and undertaking a series of pre-determined tasks (MRS, 1997). This may be done by companies assessing the activities of competitors in the market, or by companies assessing the performance of their own sales staff.

Wilson (Wilson, A., 2003) identifies three main purposes for mystery shopping:

1. To act as a diagnostic tool, identifying failings and weak points in service delivery
2. To encourage and reward staff
3. To assess competitors

## Online observation

The use of cookies allows a website owner to identify repeat visits. A cookie is a text file placed on the browser's computer that allows the browser's computer to be identified on subsequent visits. A cookie may contain the computer's address or the details of a customer registration. This means that, when the customer logs on, a personalized greeting can be made or passwords provided. Most online retailers use this system, e.g. Amazon will drive content to particular customers, based on their previous behaviour.

Browser behaviour through the site can also be captured and used.

## Ethics in observation research

There are clearly significant ethical considerations in the use of observation research. The basic rule is that, if observation is to take place in a situation in which behaviour could not usually be observed, then permission should be asked.

## Hints and Tips

- Observation measures behaviour, not reasons for the behaviour
- Mystery shopping measures service delivery, often retail, researchers work to a brief as a customer, aims to be objective and collect facts, and more than one visit may be required
- Observation can be carried out mechanically through scanners, electronic TV viewing meters, Internet cookies, and security or CCTV cameras
- There are ethical issues that arise in observation research and 'informed consent' should be the principle to guide the observation of behaviour
- Make sure you are aware of the strengths and weaknesses of different approaches and for what purposes they are most appropriate
- Collect actual examples of how observation research is used

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# QUALITATIVE RESEARCH



## Unit 7

**Syllabus Reference: 4.4–4.6**

After completing this unit you will be able to:

- Define qualitative data
- Identify and apply methods for collecting qualitative data
- Understand the process of analyzing qualitative data
- Understand the techniques of online qualitative research
- Understand how to use qualitative research to inform marketing decision-making

Key definitions

- Projective techniques – A form of disguised questioning that encourages participants to attribute their feelings, beliefs or motivations. Examples of projective techniques are word association, sentence completion and thematic apperception tests (ESOMAR, 2003)
- Moderator – An individual who facilitates but does not influence a group discussion

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- One-way window – A device used to allow researchers to view respondents without themselves being seen
- Depth interviews – A variety of data collection techniques, mainly for qualitative research, undertaken with individual respondents rather than groups (MRS, 2003)
- Topic or discussion guide – An outline of the structure, themes and timing of a focus group or depth interview
- Content analysis software – Computer software that helps with the textual analysis of qualitative research
- Brand personality tests – Asks respondents to describe a brand as a person

Qualitative research accounts for between 10 and 15 per cent of total research expenditure in the UK. It is growing in importance as marketing professionals recognize its role in providing depth of understanding about customers and their behavior. Wilson (2003) defines qualitative research as ‘Research that is undertaken using an unstructured research approach, with a small number of carefully selected individuals, to produce nonquantifiable insights into behaviour motivations and attitudes’

## Data Collection Techniques in Qualitative Research

### Focus groups or group discussions

The MRS defines group discussions or focus groups as ‘A number of respondents gathered together to generate ideas through the discussion of, and reaction to, specific stimuli. Under the steerage of a moderator, focus groups are often used in exploratory work or when the subject matter involves social activities, habits and status’ (MRS, 2003).

- Focus groups are generally made up of around 6–12 respondents. The most common number is 8. A lower number may be used when a particularly specialist topic is being discussed
- They are run and managed by a moderator, who will control the group, keeping the discussion on track and probing for further information when needed
- Groups will normally last between 45 minutes and 2 hours. Discussions are generally tape recorded or videographed
- Groups usually occur at the beginning of a research project, as they can provide very useful information to explore through other methods. The groups may be observed remotely and agencies offer clients the chance to view groups set up in special rooms, where the client can observe the group through a one-way window

### **Moderators** should be:

- Highly qualified and experienced in research and managing groups
- Business and marketing aware. They need to be able to translate respondents' feelings into business advantage for their clients
- Strong communicators, able to relate to a range of people
- Hard to place regionally in terms of socioeconomic class
- Socially able, relaxed and friendly, but strong enough to control a room of animated, or, conversely, disinterested respondents
- Flexible and quick-thinking, with the ability to respond to the unexpected

### **Stimulus material**

Stimulus material may include a range of physical objects which respondents can use to express their views nonverbally. These may include:

- Creative samples: Proofs, animated outlines of TV commercials, concept or storyboards, mail copy
- Mocked-up product packs
- Product samples

## The topic or discussion guide

A discussion guide is designed as an aide memoire, to guide the moderator through the task of moderating a group of people. It is a route map for the group interview that outlines a timetable and highlights key stages in the process. It is not a list of questions. Wilson suggests that the guide breaks the group into three distinct phases:

1. Introduction
  - a. Objectives
  - b. Personal introductions
  - c. Agenda
2. Discursive phase
  - a. Topic areas
  - b. Stimulus material
3. Summarizing phase
  - a. Summarizing discussion
  - b. Closing
  - c. Administration

## Depth interviews

This describes a variety of data collection techniques for qualitative research, undertaken with individual respondents rather than groups. Usually, in a study that involves depth interviews, 10–14 interviews will be carried out, depending on the nature of the sample. Depth interviews cost between £400 and £700 per interview.

Advantages:

- They are conducted face to face, and body language can be interpreted
- Proximity may encourage respondents to reveal more than in a remote interview
- The respondent is the centre of attention and can be probed at length to explore issues that the researcher feels are important. This is the ‘annoying child’ syndrome, with the researcher asking ‘why’ (but more subtly) until the issue is explored adequately
- Group dynamics may prevent individuals expressing themselves, particularly over areas that are sensitive, like income
- Recruitment tends to be easier
- The logistics are easier, no special rooms are needed
- They reveal depth of understanding
- They are flexible. The line of questioning may evolve within the interview and between interviews
- They can involve a range of techniques

## Projective techniques

Projective techniques are designed to allow respondents to ‘attribute their feelings, beliefs or motivations to another person, object or situation’ (ESOMAR, 2003).

Advantages:

- They are engaging for respondents, are usually fun to do, and get respondents motivated
- They provide richer insight than conventional questioning: in the right hands the analysis can be extremely revealing
- They can create excellent ideas for further exploration

The disadvantage is that they can be hard to interpret.

## Brand mapping

Is an extension of the brand personality test that involves multiple brands. Respondents are asked to identify key attributes or dimensions of a product sector and then position brands against those relative to the competition. This can be useful in identifying positioning and segmentation criteria, and is very useful in identifying gaps in the market place

## Online qualitative research

This includes depth interviews and focus groups. Focus groups use chat room technology to manage the interaction. People interact using their computers to talk to each other. Online bulletin boards are used to post messages and a group of people exchange information about a specific topic.

## Analysis of qualitative data

The starting point is to organize the data, which is contained on tape. These tapes should always be kept. The analysis should enable the broad themes discussed during the research to be explored

## Organizing the data

Wilson (Wilson, A., 2003) suggests four methods for data organization:

- Tabular – In which data is organized according to certain characteristics or themes. The content from the groups or interviews is then divided into these areas. This can be done on spreadsheets or within word processing packages
- Cut and paste – Material is physically cut from transcript and pasted into separate thematic sections
- Spider diagrams or mind maps – Places the material at the centre of a diagram with responses emanating from the centre
- Annotation – The researcher annotates the transcript to bring together common themes

## Hints and Tips

- Ideas that qualitative research methods are ‘second’ best approach rest in large part because of the predominance of the ‘scientific’ model of social research. The central values of the latter approach are objectivity and generalizability
- In contrast, qualitative approaches emphasize the importance of getting close to the subject. This is because one of the purposes of qualitative approaches is to try to depict the participant’s views. Because of the time and costs involved in such work, qualitative designs do not generally draw samples from large-scale data sets. Ideas of ‘second’ best also rest on the stereotypes that arise when quantitative and qualitative approaches are compared in this way
- In some ways the concerns that arise about a qualitative/quantitative divide can be resolved by giving greater attention to how these approaches can be combined
- The CAQDAS Networking Project was set up, in conjunction with ESRC, to disseminate an understanding of the practical skills needed to use software to facilitate qualitative data analysis and to encourage debate about issues raised by the use of such software. <http://caqdas.soc.surrey.ac.uk/>
- The most important issue regarding types of research is ‘fitness for purpose’, i.e., will the research approach yield the data that is needed and help to ensure that the research objectives are achieved

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance



# QUANTITATIVE DATA

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## Unit 8

**Syllabus Reference: 4.4–4.6**

After completing this unit you will be able to:

- Define quantitative data
- Understand the methods for collecting quantitative data
- Identify online methods for online quantitative data capture
- Define and describe the use of CAPI, CATI and CAWI
- Explore the range of applications enabled by quantitative research

## Key definitions

- CAPI – Computer Aided Personal interviewing
- CAWI – Computer Aided Web interviewing
- CATI – Computer Aided Telephone interviewing
- Omnibus surveys – ‘A survey covering a number of topics, usually for different clients. The samples tend to be nationally representative and composed of types of people for which there is a general demand. Clients are charged by the market research agency on the basis of the questionnaire space or the number of questions required’ (MRS, 2003)

## What is quantitative data?

Wilson identifies five key characteristics of quantitative data:

- Data gathering is more structured
- Research involves larger samples than qualitative research
- The data gathered can provide answers that will quantify the incidence of particular behavior motivations and attitudes in the population under consideration
- Studies can be more easily replicated and direct comparisons can be made between studies
- Analysis is statistical in nature and will usually be done with the help of computer software

## Survey methods

Surveys are defined by the MRS as 'The systematic collection, analysis and interpretation of information about some aspect of study. In market research, the term is applied particularly to the collection of information by means of sampling and interviews with the selected individuals' (MRS, 2003)

## Face-to-face interviews

These are interviews that are carried out with respondents in face-to-face contact with the interviewer; results are recorded on paper or digitally on a Personal Digital Assistant, palmtop or laptop computer. These can be distinguished from interviewer-administered surveys that are carried out remotely via the telephone or a 'help me' button on a web page

## In-home or doorstep interviews

These are interviews carried out at the home of the respondent. These may be important if the sample is determined by post code or type of dwelling. They have the advantage of putting the respondent at their ease but are generally hard to manage

## Street interviews

These are perhaps the most visible forms of marketing research. Street interviewing has a number of advantages:

- They are less expensive than home interviews
- They allow respondents who conform to quota specifications to be identified and approached – e.g. women with children or older men

Disadvantages include:

- Some shopping centres charge a fee or do not allow researchers to interview customers
- Respondents are unlikely to stop in the open air if it is raining
- Interviews need to be as short as possible
- There are many distractions to the respondent – e.g. children or friends who are impatient

## CAPI

Computer Assisted Personal Interviewing is conducted face-to-face, usually employing Personal Digital Assistants (PDAs) and, if these are connected to a mobile telephone network, results can be uploaded immediately

## Changing environment

- There is far greater acceptance of the telephone as a means of communication. Younger people are very comfortable on the telephone. It is common to see people using their mobile phones to talk to each other, even when they are only 30 metres away from each other
- Over 30 per cent of Motor Insurance policies are sold over the telephone
- Two per cent of the entire UK work force is employed in the 'call centre' industry. This is more than mining, fishing and agriculture combined
- The UK is the largest user of call centres in Europe, employing 39 per cent of the total agents in Europe
- The UK has 5000–16,000 call centres, depending on the definition used
- Mobile phones and mobile Internet mean that research can use a range of methods to reach and stimulate respondents

## Telephone

### Advantages:

- The cost at around £10–£20 per interview is lower than face-to-face. Larger surveys can be administered via a call centre, far cheaper than this at around £5 per call. The use of automated research is more common in the USA but it is possible to run a research programme using voice recognition software.
- Control is much easier. The latest call centre software allows for call and interviews to be recorded or monitored by research managers.
- Bias due to nonverbal influence is removed and verbal influence can be controlled through the monitoring process.
- It is good for geographically dispersed samples. These can be accessed through the telephone without the need for the interviewer to travel. This saves time and money
- It is fast
- It is convenient for the interviewer and the respondent. Calls may be made that allow the interviewer to call back at a convenient time to deliver the interview
- Third generation mobile phones, mobile Internet and SMS text messaging, have extended the capability of the phone as a medium for data capture

## Disadvantages:

- Generally the telephone has lower response rates than face-to-face interviews
- Respondents find it easier to say 'no' on the telephone
- They may screen their calls
- Research design is restricted. The use of stimuli is limited, even if the interview is carried out via mobile Internet. The length of the interview has to be shorter than face-to-face interviews, in order to maintain the interest of the respondent
- Some social classes have a greater preponderance of ex-directory numbers
- Access to mobile telephone numbers may be difficult to obtain
- The use of cold calling by certain market sectors has created a problem for market researchers
- In certain international markets, issues of telephone access might be a concern

## CATI – Computer Assisted Interviewing, over the telephone

CATI can facilitate the design administration and analysis of telephone interviewing

Questionnaires can be customized and verbal comments can be recorded

Inconsistencies can be highlighted and the researcher can probe to correct the inconsistency. Automated dialing allows for efficient management of the interviewer

## Web-based interviews

Whilst not strictly interview administered, the use of 'call me' or 'help me' buttons on web-administered questionnaires allows a degree of interviewer assistance to take place. 'Help me' buttons allow a pop-up dialogue screen in which questions can be asked and answered. 'Phone me' allows the respondent to be contacted by telephone and helped through the questionnaire. In some instances, it is possible for a contact centre to see the respondent's screen. Use of CAWI is helping this process

Online methods have a number of advantages:

- They are cheap to administer, design, deliver and analyze
- They are flexible in content and can include image and sound files
- They are fast to administer and to report on
- They have immediate and low-cost global reach
- They can replicate customer behaviour in both consumer and business markets
- They can be used automatically as pop up as a browser scrolls over a part of the web page
- They are easy to control
- They can be completed at the respondent's convenience



## Disadvantages:

- Technology is varied and the use of attachments or HTML e-mails may not be supported by all computers
- The amount of unsolicited e-mail or spam may affect perception of the questionnaire
- Samples might be difficult to construct as e-mail lists are not very reliable and there is limited access to the Internet and e-mail
- It may be hard to validate who has responded as anybody could be using the computer
- People remain suspicious of the Internet and confidentiality needs to be ensured
- There may be a cost to the respondent
- The ease of use in some organizations has led to very poor 'research' being carried out on an ad-hoc basis

## Hints and Tips

- Quantitative research produces data that can be analyzed statistically
- Nearly everyone uses numbers and numerical relationships every day, even though there are stories that people do not know how to add and subtract well enough to check their change and that many of us have “maths anxiety”
- Most people know more about quantitative reasoning than they think they do at first, and all of us are capable of amazing feats of calculation and reasoning, once we get the instruction that lets us in on the trick of it
- As you reflect on your quantitative skills, be sure to think about those skills that you use at work, at home, in education and in general, in order to identify your abilities in understanding, interpreting and using numerical information, charts and graphs, statistical information, formulas, and quantitative problem-solving techniques. You will be surprised!
- Statistics can demonstrate the strength of the relationship between different variables, i.e., how variables are correlated to each other. However, this is not the same as demonstrating a causal relationship

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# QUESTIONNAIRE DESIGN

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## Unit 9

**Syllabus Reference: 4.4, 4.5**

After completing this unit you will be able to:

- Define the questionnaire
- Understand and outline the questionnaire design process
- Understand questionnaire formats
- Understand how to word a questionnaire
- Understand the issues in question sequencing
- Outline the role of piloting in the delivery of the questionnaire
- Outline the use of software packages to enable design of the questionnaire

## Keywords

- Questionnaire – A structured data collection mechanism, involving a range of question formats and completed orally or in print. Questionnaires may be administered by interviewers or self completed by the respondent
- Coding – Turning responses into a form that enables analysis, usually by allocating a unique number to each response

Contd.

- Semantic differential – A scaling question that asks respondents to indicate the strength of their views, on normally a 5- or 7-point scale, between bipolar adjectives or statements
- Dichotomous questions – Questions for which there are two possible replies
- Forced scale – A scaling question that does not allow for a neutral response
- Likert scale – A scaling approach that asks respondents to indicate their strength of agreement, or disagreement, with a range of statements on a 5-point scale
- Scaling questions – Questions assigning numerical values to subjective concepts
- Skip questions – Questions that take respondents to other questions determined by the answer

## The questionnaire design process

Wilson (2003) identifies a process for questionnaire development:

- Develop question topics
- Select question and response formats
- Determine sequence
- Design layout and appearance
- Pilot test
- Undertake the survey

## What type of questions can be asked?

There are four main question types. These are:

- Closed questions – dichotomous
- Closed questions – multiple choice
- Open-ended
- Rating scales

### Closed questions – dichotomous

Simply, these are questions to which there are only two possible answers, e.g. yes and no. This sounds simple, but the question asked must fit into this answer structure

### Closed questions – multiple choice

It is important that, when multiple choice questions are being designed, the answers are mutually exclusive. Other issues with multiple choice responses include the number of potential responses. This may mean that the respondent cannot remember the first answers. In face-to-face interviews the responses may be put on a show card. This is not always possible in other media

## Open-ended questions

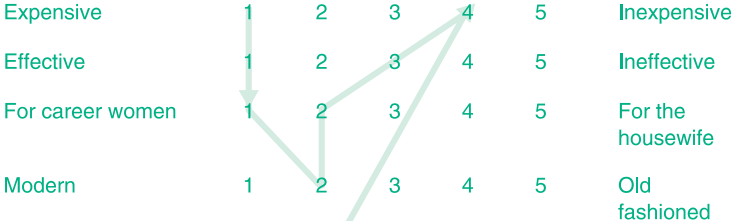
- Open-ended questions are questions in which an answer is not suggested. The respondent is free to respond in any way. The problem with open questions is analysis. If there are many categories of answers, then it may be hard to code the responses and it may reduce the effectiveness of the analysis
- One way around this is to pilot the survey and produce a pre-coded list of potential responses, which allows the interviewer to interpret the response and code it
- Open-ended questions can be very useful and the difficulties in managing them within a questionnaire are not huge. Their value can certainly outweigh these difficulties

## Likert scales

The Likert scale asks respondents to indicate their level of agreement with a range of statements. Responses are scored from 1 to 5 and the result is an average score for each statement, indicating the level of agreement with the statement

### Semantic differentials

Semantic differentials use words or statements and their opposites and measure the strength of opinion between them. The words are generated from exploratory or qualitative research



Key

- Brand A (blue arrow)
- Brand B (red line)

Semantic Differentials

## Select wording and phrasing

Avoid:

- Ambiguity
- Two questions in one
- Leading or loaded questions
- Making assumptions
- Generalization
- Negative questions
- Hypothetical questions

Sequencing

- Wilson suggests that the questionnaires should be funnel sequenced, i.e. going from the broad to the narrow. The interviewer asks the most general questions about the subject and moves to narrower and more focused questions



## Design, layout and appearance

The physical appearance of the questionnaire will determine levels of response, even if the questionnaire is interview-administered. It needs to be:

- Spaced effectively – it may save money but will reduce response
- Set in a serif type face. The serifs are the feet on the letters of a serif type face that keep the eye on the line; they are known to increase comprehension
- In at least 10 point font so that people can read the questionnaire
- Use skip and filter questions and routing instructions to help the respondent work through the questionnaire

## Pilot

Piloting or testing the questionnaire is crucial

- It allows problems to be corrected
- Helps with the coding process
- Improves question sequencing
- Improves wording of questions

## Questionnaire checklist

- Are the objectives right?
- Will the data specified meet the objectives?
- Will the questions listed collect all the data required?
- Is every question essential?
- Will the right type of data be collected for: fact? opinion? motive?
- Is the question sequence logical?
- Are the types of questions being used appropriate: dichotomous? multiple-choice? open-ended? rating scales?
- Is the question wording: simple to understand? unambiguous? clear?
- Is it reasonable to expect the respondent to answer every question?
- Will the answers be easy to record?
- Will the answers be easy to process?
- Does the questionnaire look good?
- Will it, and any show material, be easy for the interviewers to use?
- Has the questionnaire been piloted?
- Is the right type of questionnaire being used: personal? postal? telephone? online?

Source: Crouch and Housden, 2003

## Hints and Tips

- Go to the MRS website and download the document Questionnaire Design Guidelines

The process for construction of questionnaires follows these stages:

- Develop question topics
- Select question and response formats
- Select wording
- Determine sequence
- Design layout and appearance
- Pilot test
- Undertake survey
- Key aspects of layout are – spacing, quality of production, variety and coding/analysis requirements
- Question types include – open-ended, closed, and scalar
- Do get feedback on your initial list of questions. Feedback may be obtained from a small but representative sample of potential responders. A field trial of a tentative form of the questionnaire is also desirable

Contd.

- Do locate personal or confidential questions at the end of the questionnaire. The early appearance of unsettling questions may result in respondents discontinuing the questionnaire
- Do order categories. When response categories represent a progression between a lower level of response and a higher one, it is usually better to list them from the lower level to the higher in left-to-right order, for example
- Try not to ask people to rank responses. They cannot be reasonably expected to rank more than about six things at a time, and many of them misinterpret directions or make mistakes in responding
- Look at the following websites:

<http://www.insitefulsurveys.com/survey-index6/Designing-A-Questionnaires-.html> [http://www.dobney.com/market\\_research.htm](http://www.dobney.com/market_research.htm)

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# SAMPLING



## Unit 10

**Syllabus Reference: 4.6, 5.1**

After completing this unit you will be able to:

- Define sampling
- Understand how to construct a sample for a survey
- Understand and identify the sampling process
- Understand and apply the statistical basis of sampling
- Understand and evaluate different sampling methods
- Understand the concepts of population, census and sample
- Understand how the sampling frame is constructed

### Key definitions

- **Sample** – A part or subset of a population taken to be representative of the population as a whole
- **Sampling frame** – A list of the population of interest that is used to draw the sample in a survey
- **Population** – A population is the total number of people in any defined group of interest

Contd.

- Census – A survey of the entire population
- Confidence level – The probability that the true population value will fall within a known range
- Probability sampling – A sampling method that uses objective sample selection, so that every member of a population has a known probability of being selected
- Cluster sampling – A procedure in which clusters of population units are selected at random and then all or some of the units in the chosen clusters are studied
- Non-probability sampling – Non-probability sampling involves a subjective selection of respondents. Therefore, the probability of selecting respondents is unknown
- Sample error – The error in a survey caused by using a sample to estimate the value of a parameter in the population
- Systematic sampling – A probability sampling method, in which respondents are selected using a 1 in 'n' approach
- Stratified random sampling – A probability sampling method, in which the sample is forced to contain respondents from each of the key segments of a population
- Standard deviation – A measurement of dispersion that calculates the average distance of the values in a data set from the mean value
- Snowball sampling – A type of non-probability sampling, where initial respondents are selected at random and subsequent respondents are then selected by referrals or information from the earlier respondents

Wilson (2003) highlights five key questions that inform the sampling process:

1. We need to understand the nature of the people we wish to survey
2. We need to know where they are
3. We need to know how we select them
4. We need to know the number of people we wish to survey
5. We need to understand how representative this sample is of the population as a whole

## What is a sample?

Sampling is used to make an estimate of the characteristics of the population as a whole. Sampling overcomes the impossibility in almost every market of asking all members of a population their opinion

The sampling process. Wilson (2003) outlines a six-stage sampling process:

- Define the population of interest
- Determine whether to sample or census
- Select the sampling frame
- Choose a sampling method
- Determine the sample size
- Implement the sampling procedure

## Sampling Methods

There are two broad sampling methods:

### Probability sampling

The key characteristic is that every member of the population of interest has a known chance of being selected, independent of any subjective selection by the researcher

Four commonly used methods of probability sampling:

- Simple random sampling
- Systematic sampling
- Stratified random sampling
- Cluster sampling



## Simple random sampling

Each member of the population has an equal chance of being selected for the survey. Members are randomly selected by a computerized random number generator or tables until the required sample size is filled

## Stratified random sampling

This method divides the population into two or more mutually exclusive groups, e.g., men or women, users or non-users of a product, and takes random samples from within them, using either of the methods above

## Cluster sampling

Cluster sampling is a procedure in which clusters of population units are selected at random and then all or some of the units in the chosen clusters are studied. The technique works when a population can easily be divided into representative clusters, e.g. in membership directories

## Non-probability sampling

Examples of non-probability sampling are:

### Convenience sampling

Based on the convenience of the researcher

### Judgement or purposive sampling

The researcher consciously selects a sample considered appropriate for the study. This may be based on certain companies representing a sector. The market might include all major department stores in the sample, as well as a random selection of other outlets

### Quota sampling

Is defined by ESOMAR as 'A type of non-probability sample where the required number of units with particular characteristics are specified'. This is based on the idea that, if known characteristics of the population are reproduced in the same proportion in the sample, it is representative of that population; e.g. age, sex and social class can be used to select quotas

### Advantages of quota sampling include:

- Speed and cost
- Allows sampling to take place where a sample frame may not be available but key characteristics of the population are known – e.g. in overseas b2b research
- Interviewers do not have to interview named individuals, they are screened in or out via a small number of classification questions
- The data, when compared to random methods which are perhaps double the cost, has been proven to be acceptable, provided that the research is managed effectively
- Cost savings may be used to improve the quality of research, through increasing sample sizes or using a different method in support of the survey
- Its popularity shows that it works!

### Disadvantages include:

- Whilst known characteristics may be distributed in correct proportions, unknown characteristics that may be relevant to the survey may not be. Hidden bias may exist that is not discovered
- Researchers may be biased as to the type of respondents they choose to interview

## Hints and Tips

- It is important to understand in what circumstances and for what purposes different approaches to sampling are used
- The objectives of the research will determine the type of sample that is needed, e.g., are the views of a particular sub-set of the population required, or are the views of a representative group of the whole population needed?
- Companies spend a lot of money trying to identify and reach sections of the population from which profitable customers can be drawn. Effective sampling for research can contribute to this objective

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# QUANTITATIVE DATA ANALYSIS

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## Unit 11

**Syllabus Reference: 4.6, 5.1**

After completing this unit you will be able to:

- Understand the process of data management, entry, editing, coding and cleaning
- Understand concepts of tabulation and statistical analysis
- Understand the main techniques of statistical analysis, including descriptive statistics, statistical significance and hypotheses testing, the measurement of relationships and multivariate analysis
- Understand the use of computer packages that can help with the process

### Key definitions

- Coding – The process that allocates a number to each answer and it is this that allows analysis to take place
- Interval data – Similar to ordinal data, but with the added dimension that intervals between the values on a scale are equal
- Ratio data – Actual or real numbers that have a meaningful or absolute zero

Contd.

- Factor analysis – Studies the relationships between variables to simplify data into a smaller set of composite variables or factors
- Cross tabulations – Table setting out responses to one question relative to others
- Coefficient of determination – Measure of the strength of linear relationship between a dependent and an independent variable
- Conjoint analysis – Analysis that asks respondents to make decisions between various attributes measuring their relative importance
- Chisquare – A test measuring the goodness of fit between the observed sample values and the expected distribution of those values
- Z Test – A hypothesis test about a single mean where the sample is greater than 30
- T Test – A hypothesis test about a single mean where the sample is less than 30
- Null hypothesis – The hypothesis that is tested
- Least squares – A regression method that produces a line of best fit for a data set involving a dependent and independent variable
- Independent variable – A variable that has influence on the value of the dependent variable
- Dependent variable – The response measure studied
- Regression – Examines the relationship between two variables

## Introduction

The analysis of data is a key skill of the marketing manager. An ability to understand basic methods of data analysis is useful. Data analysis can be done easily now, using computer packages such as Excel and SPSS

## Editing and coding

Before data is processed, it is assessed for completeness and coherence. The editing process involves computer or manual checking of the data, to look for respondent or interview errors or inconsistencies

Coding is the process that allocates a number to each answer and it is this that allows analysis to take place. Coding open questions involves using a sample of the completed questionnaires and developing a coding frame, or a list of codes for all possible responses to an open question

## Data entry

Data entry may be carried out automatically through CAPI, CAWI and CATI systems, or scanned into the computer using optical character recognitions software, or they may be entered by hand. Once this is complete, the data can be analyzed

## Tabulation and statistical analysis

There are four types of data that can be analyzed:

### Nominal data

These refer to values that are given to objects that, in themselves, have no intrinsic numerical value. For example, we assigned a value to gender: 1 for men and 2 for women

We can count them and create percentages

### Ordinal data

These data represent rank order data. They do not imply that there is an equal gap between items ranked and there is no other meaning to them other than rank order



## Interval data

It is rank order data in which the intervals between the data are equal. These are also known as interval scales. Interval scales rank elements relative to each other, but not from any observable origin. This means that the data has its meaning only by virtue of the comparison between elements selected

## Ratio data

Ratio data has an absolute zero or observable origin. For example, shoe size, products bought, or age. This means all analyses are possible

## Statistical significance

- The data from a sample will always be subject to error. We cannot be sure that the difference between two results is a real change in those values, or simply a result of the sampling error. If the difference is large enough not to have occurred through chance or error, then the difference is defined as statistically significant

## Simple regression analysis

- Regression analysis is concerned with dependence. For example, sales volume may be predicted based on other variables. The allocation of dependent and independent variables is more important in regression analysis. Movement in the dependent variables depends upon movement in the independent variables
- Sales forecasters use regression analysis. However, it is clear that the movement in a market is caused by a number of factors and this is dealt with through multivariate techniques, which we will look at later

## Least squares

This is the most common approach to regression. Least squares identifies a line of best fit between observations and this enables an estimated regression function that indicates the relationship. Simple regression analysis may be enhanced through the coefficient of determination. This measures the strength of the relationship between variables

## Factor analysis

Factor analysis reduces a large number of variables to a more manageable smaller set of factors, based on the interrelationships between them. It provides insight for the groupings that emerge and allows for more efficient analysis of complex data

## Cluster analysis

This technique groups objects or respondents into mutually exclusive and exhaustive groups

The technique is often used in data base marketing to create segments, based on behaviour across a range of variables

## Multidimensional scaling or perceptual mapping

Consumers rate objects, often brands, by the relative strength of an attribute compared to other objects or brands. This creates a perception of a 'position' in the market and is very useful for determining brand perception and repositioning

## Conjoint analysis

Conjoint analysis is a way of looking at customers' decisions as a trade off between multiple attributes in products or services. In conjoint analysis, consumers are asked to make decisions about various attributes, trading lower price for comfort, for example, in car purchases

## Software packages

There are many software packages on the market that will do most of this for you

The key thing is to understand what these packages will do to your valuable data and to produce efficient analysis, which allows a focus on the research problem. Excel is adequate for most of the key formulae outlined above, but there are specialists; perhaps the best known software packages include:

SPSS [www.spss.com](http://www.spss.com) and SNAP [www.mercator.co.uk](http://www.mercator.co.uk)

## Hints and Tips

- Market metrics are used in business planning and marketing monitoring to keep the marketing programme on track. The most common market metrics that companies use are:

- Market size

- Market share

- Market penetration

- Installed base

- Product usage

- Customer attitudes

- Brand awareness

- Advertising awareness

- Brand image

- Customer satisfaction

- Quantitative surveys mean getting people to answer fixed questions in questionnaires. Because the objective is measurement, it is important that all people answer the same question

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

# PRESENTING MARKETING RESEARCH



## Unit 12

### Syllabus Reference: 5.2–5.4

After completing this unit you will be able to:

- Identify the structure for the presentation of a research report
- Outline the key features of an oral presentation
- Know how to make the most of a presentation
- Understand the use of graphics in presentation of data

### Key definitions

- Oral presentation – A verbal presentation of research findings, using a range of supporting material
- Executive summary – A precis of the report

The final report to the client is perhaps the most important part of the research planning process

## Research report format

- Title page
- Contents
- Executive summary
- Introduction
- Situation analysis and problem definition
- Research methodology and limitations
- Findings and analysis
- Conclusions and recommendations
- Appendices

Research has shown that people forget:

- 30 per cent of what you tell them after just 3 hours
- 90 per cent after only 3 days

Visual aids can help and variety is the key. The combination of verbal and visual material has been shown to deliver 85 per cent recollection after 3 hours and up to 65 per cent after 3 days

## Problems in presentations

Wilson (2003) presents a list of common problems in presenting reports:

- Assuming understanding: there is insufficient background and interpretation given to results
- Excessive length
- Unrealistic recommendations which are commercially naive
- Spurious accuracy: results are based on too small sample sizes
- Obscure statistics: a range of obscure techniques may not be useful
- Over elaborate presentation: too many graphics may obscure more than it reveals



## Hints and Tips

Presenting market research results orally involves:

- Understanding your audience and responding to their needs
- Structuring the presentation – Introduction, Methodology, Key findings, Conclusions and recommendations, and Questions
- Delivering the presentation confidently and professionally
- Presenting data appropriately using tables and charts
- There are common mistakes to be avoided, including:
  - Assuming prior knowledge
  - Presenting for too long
  - Misleading about accuracy or with statistics
  - Distracting the audience from the key message through technology
  - Relying solely on technology that might not work
- Look at the following website [www.presentationbiz.co.uk/articles/articles\\_general.htm](http://www.presentationbiz.co.uk/articles/articles_general.htm)

Go to [www.cimvirtualinstitute.com](http://www.cimvirtualinstitute.com) and [www.marketingonline.co.uk](http://www.marketingonline.co.uk) for additional support and guidance

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