

**The Chinese University of Hong Kong
Term 1 of 2025-26**

**MKTG5012MA/MB/MC
MARKETING RESEARCH**

**MA: Tuesday 09:30am-12:15pm
MB: Tuesday 02:30pm-05:15pm
MC: Wednesday 09:30am-12:15pm**

Venue:

MA-CYT LT5

MB-CYT 410

MC-YIA 403

**Examination for MA, MB, MC:
14:30-17:15 on Nov 15 (Saturday)
Venue: YIA LT1**

**Tutorial by Dr. Rebecca LI for all
related quantitative courses (optional)
Time: Friday 13:30 – 14:30
Sep 12, 19; Oct 3, 17, 24, 31; Nov 7,
14, 21**

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Level in Statistics Knowledge: Entry.

Level in Programming Skill: Entry.

1. Course description

Marketers have to build businesses by understanding and meeting the needs of consumers. They have to make important marketing mix decisions that affect their companies, competitors, customers, consumers and many stakeholders. Hence, marketers must have the capability to make decisions by clearly identifying key findings from data, drawing conclusions, and obtaining agreement among a group of key stakeholders on their recommendations. Data can come from different sources, and marketers have to decide whether to get more data with resources (time, cost) or not, when to conduct marketing research, what research designs are available, and how to select one and execute it to meet the research objectives. This course will cover the key marketing research strategies for building a business, enhancing “current” products/services, and introducing

“new” ones. It will cover the development of new products from rigorous marketing research within a stage-gate process, as well as the strategic considerations for a new product.

Lectures and group projects will be used to cover different industries and companies. Students will have opportunities to apply what they have learned from lectures, collect, process and analyze data, and communicate their recommendations, both in written language and verbal expression. Through discussions and group projects, students can learn from one another and develop key qualities of marketers. Guest speakers are invited to share the latest practices.

2. Course objectives

Overall, the key competence goal for the course is for students to demonstrate effective teamwork and leadership skills. In terms of learning objectives, students will possess effective team management skills. More details are as follows:

1. Help students understand key stages of the research process, namely: formulate the problem, determine the research design, design the data-collection method and forms, design the sample, collect the data, analyze and interpret the data, and prepare the research report.
2. Enable students to sharpen their analytical skills by working with facts and figures to produce quantitative and qualitative evidence, supporting recommendations and decisions.
3. Inspire students to think strategically about marketing research.

3. Learning outcomes

Overall, there are two key learning goals for the marketing research course:

Learning goal 1: Our students will possess a firm grasp of modern marketing theory.

Learning Objective: Our students will be able to apply marketing concepts, principles and theories to implement effective marketing operations.

Learning Goal 2: Our students will be equipped with appropriate analytical and quantitative techniques.

Learning Objective: Our students will be able to apply advanced analytical and quantitative techniques to make sound marketing decisions.

On completion of this course, students should be able to:

1. Obtain knowledge of the key stages of the research process, and be able to perform work required for each stage with the high quality expected of a marketer.
2. Have the analytical skills necessary to work with facts and figures to produce quantitative and qualitative evidence supporting recommendations and decisions for actual business situations.
3. Think strategically about marketing research – whether to do it or not, and how to do it – before making a decision.
4. Communicate findings, conclusions, and recommendations persuasively.

4. Assessment type

Group Assessment	
Product concepts	10%
Questionnaire	10%
Research report	15%
Presentation	20%
Individual Assessment	
Class participation	15%
Examination	30%

The grade for each student will reflect their level of performance as follows:

	Grade Description
A	Outstanding performance on all learning outcomes
A-	Generally outstanding performance on all (or almost all) learning outcomes
B+, B, B-	Substantial performance on all learning outcomes, OR high performance on some learning outcomes which compensates for less satisfactory performance on others, resulting in overall substantial performance
C+, C, C-	Satisfactory performance on the majority of learning outcomes, possibly with a few weaknesses
D	Barely satisfactory performance on a number of learning outcomes
F	Unsatisfactory performance on a number of learning outcomes, OR failure to meet specified assessment requirements

Individual participation in class

- A. Please actively participate by asking or answering questions in class.
- B. Please attend all classes unless you are sick or have another valid reason. Please send an email to the teaching assistant with supporting documents if you cannot attend class.
- C. Please check **your CUHK email** regularly in case there are any urgent announcements for a class, such as a weather emergency.

Forming groups to work on cases and projects

- A. Students should form groups of no more than eight for the project.
- B. Afterwards, one student from each group should send an email to the teaching assistant with subject line course title (MKTG5012MA / MKTG5012MB) and “group project members”, and provide the student IDs and names of all students in the group.
- C. Students who do not have a group by class on the third week of the course will be randomly assigned to one.
- D. No group swapping is allowed afterwards.
- E. Only one student from a group emails the teaching assistant to submit the group project.

- F. The individual contribution of each student will be reflected in peer evaluations (Appendix II). It will be conducted at the end of the course after the group project presentation. If you choose not to send back the peer evaluation form, we will assume that you give equal contribution to all other group members. The evaluation will be treated as a reference for assessment.

Examination

- A. The examination will test your understanding of the materials covered in class.
B. The examination will mainly cover the content of the lectures and talks in class.

5. Feedback to students

Students can receive timely and qualitative feedback beyond grades & scores. The turn-around time is 2 weeks from the submission deadline. Qualitative feedback will be provided to all students by various means, for example, written comments on group assignments and feedback after student presentations. As it can be a valuable experience for students to review their examinations, there will be a period of time when all students can look at (but not take away) their exams and consider their performance. This is intended to highlight the educational benefits rather than give an opportunity to appeal.

6. Required and recommended readings

Required readings:

1. Malhotra, Naresh K. (2020), Marketing Research: An Applied Orientation, 7th Edition, Pearson.
2. Lam, Howard Pong Yuen (2023), Marketing Research with R and Python, World Scientific, forthcoming.

Recommended readings:

1. Iansiti, Marco., Toffel, Michael., Herman, Kerry and Kelley, Julia (2016), Product Development Fundamentals, Harvard Business School, 9-617-024, October 3, 2016.
2. Steenburgh, Thomas and Avery, Jill (2010), Marketing Analysis Toolkit: Market Size and Market Share Analysis, Harvard Business School, February 4, 2010, 9-510-081.
3. Malhotra, Naresh K. (2014), Basic Marketing Research, 4th edition, Pearson.
4. Birnbaum, M. H. (1999). How to show that $9 > 221$: Collect judgments in a between-subjects design. Psychological Methods, 4(3), 243.
5. Dhar, R. (1997). Consumer preference for a no-choice option. Journal of consumer research, 24(2), 215-231.
6. Fernbach, Philip M., Sloman, Steven A., Louis, Robert St. and Shube, Julia N. (2013), Journal of Consumer Research, Vol. 39, February 2013.

7. Details of the course website

<http://blackboard.cuhk.edu.hk>

8. Usage of AI tools

This course applies AI Approach 2: to use AI tools only with prior permission (**EXCEPT Final Exam**). AI tools such as Chat-GPT, Vertex AI, Google Gemini, Doubao, etc. can be used to help you enhance your understanding of analytical process and your writing and presentation of your research project. However, these tools should NOT be used to generate any drafts or solutions directly. Ideas and drafts should be the student's original work. AI tools could enhance our learning outcome, but never replace our efforts to learn.

Students may refer to guidelines from the Chinese University of Hong Kong for reference.

Use of some AI tools is allowed

Students may use some AI tools in some learning activities and/or assessments on the following conditions:
The AI tools to be used are restricted to the following tools: (Specify the AI tools that are allowed. Teachers may also specify which AI tools are not allowed) ;

The specified AI tools will only be allowed for the following types of learning activities and/or assessments: (Specify the learning activities and/or assessments)

Collaboration of AI tools is only allowed for the following purposes/tasks: (Specify the purposes/tasks for which the AI tools can be used or used with certain restrictions, if any);

The input contributed by the AI tools are properly acknowledged and cited; and

The input together with the prompts used to elicit the AI responses should be highlighted or included as appendices wherever appropriate.

In case of queries, students should seek advice from the course teacher.

Acknowledging support from AI tools

Students are required to acknowledge all functional uses of an AI tool and cite it when they paraphrase, quote, or incorporate into their own work any content (whether it is text, image, data, or other format) that was created by it.

i. An example of acknowledgement

'I acknowledge the use of (name of AI tool – e.g. ChatGPT (<https://chat.openai.com/>) to (specify the support, e.g. plan my essay, generate some ideas for the content, ask for examples of data collection instruments, get the dates of historical events, etc.).

ii. An example of citation

OpenAI. (2023). *ChatGPT* (Mar 20 version). <https://chat.openai.com/chat>

(Students are reminded that due to the rapid developments of AI tools, some citation formats may be updated regularly.)

iii. An example of including texts generated by an AI tool in their work

"The following text was generated by an AI tool/language model (ChatGPT):"

[Insert the text generated by ChatGPT here.]

iv. An example of including texts generated by an AI tool and the prompts that were used to elicit the text from the AI tool

"[The prompt], as generated by an AI language model (ChatGPT):"

[Insert the text generated by ChatGPT in response to the prompt.]

Students are reminded to learn and use the AI tools responsibly and ethically and be aware of the limitations.

Improper/unauthorized use of AI tools in learning activities and assessments will constitute acts of academic dishonesty which will be handled in accordance with the University's Procedures for Handling Cases of Academic Dishonesty.

Students are reminded to clarify with the course teacher and obtain permission if necessary when in doubt.

9. Academic honesty and plagiarism

Attention is drawn to University policy and regulations on honesty in academic work, and to the disciplinary guidelines and procedures applicable to breaches of such policy and regulations. Details may be found at <http://www.cuhk.edu.hk/policy/academichonesty/>.

With each assignment, students will be required to submit a signed declaration that they are aware of these policies, regulations, guidelines and procedures. For group projects, all students of the same group should be asked to sign the declaration.

For assignments in the form of a computer-generated document that is principally text-based and submitted via VeriGuide, the statement, in the form of a receipt, will be issued by the system upon students' uploading of the soft copy of the assignment. Assignments without the receipt will not be graded by teachers. Only the final version of the assignment should be submitted via VeriGuide.

10. Electronic submission of assignments via VeriGuide

Current University policy requires that all student assignments that are computer-generated and principally text-based should be submitted via VeriGuide. For details, please refer to <http://www.cuhk.edu.hk/veriguide>

11. Course schedule

Date in bold font refers to dates of MA and MB sessions and regular refers to dates of MC session.

	Date	Content	Reading
1	Sep. 02/03	Introduction to Marketing Research Defining the marketing research problem and developing an approach R: Installation, R Console, RStudio	Malhotra (2020): Ch. 1-2 Lam (2023): Ch. 1-2
2	Sep. 09/10	Product Development Fundamentals R: Arithmetic operations, Assignment operations, Functions, Library	Iansiti et. al. (2016) Lam (2023): Ch. 3
3	Sep. 16/17	Product Concept Test Research Design R: Conditions, Loop	Fernbach et. al. (2013) Malhotra (2020): Chapter 3
4	Sep. 23/24	Exploratory Research Design: Secondary and Syndicated Data Exploratory Research Design: Qualitative Research R: Read and Write File	Malhotra (2020): Ch. 4,5,6
5	Sep.30 /Oct.08	Descriptive Research Design: Survey and Observation Measurement and Scaling: Fundamentals	Malhotra (2020): Ch. 6, 8
6	Oct. 21/15	Measurement and Scaling: Comparative and Noncomparative Scaling Techniques Questionnaire and Form Design R: Chi-Square Test, Correlation, t-test	Malhotra (2020): Ch. 9,10 Lam (2023): Ch. 4,5
7	Oct. 28/22	Frequency Distribution, Cross-Tabulation, and Hypothesis Testing Analysis of Variance R: Analysis of Variance (ANOVA)	Malhotra (2020): Ch. 15,16 Lam (2023): Ch 6
8	Nov. 04/ Oct. 29	Correlation and Regression Sampling: Design and Procedures Sampling: Final and Initial Sample Size Determination R: Regression	Malhotra (2020): Ch. 17,11,12 Lam (2023): Ch 7,8
9	Nov. 11/05	Fieldwork, Data Preparation Report Preparation and Presentation R: Word Cloud, String, Sentiment Analysis, Web Scraping	Malhotra (2020): Ch. 13,14,23
10	Nov. 18/12	Causal Research Design: Experimentation Marketing Analysis Toolkit: Market Size and Market Share Analysis R : Graphics	Malhotra (2020): Ch. 7
11	Nov. 15 (Sat.)	14:30 – 17:15 Final examination (Venue: YIA LT1)	
12	Nov. 25/19	Final Presentation	

Appendix I – Group Project

1. Topic

Your project is to help a company build business by enhancing one of its current products/services or launching a new product/service in Hong Kong, or one of the cities in mainland China.

When you select a company for the project, consider the following factors:

Marketing research for decision making: Could marketing research provide results, conclusions and recommendations for the company?

Data availability: Is the company listed with publicly available information, or is the company willing to provide information for the project?

Passion: Are students in the group interested enough to work on the project for this company?

Feasibility: Marketers of different products may have different target consumers. You may want to choose products/services with mass appeal so that you can find enough respondents for research.

2. Guidelines

City

You can choose to focus on one city, such as Hong Kong, Shenzhen, Guangzhou, Shanghai, Beijing, or any other city within mainland China. It is also fine if you want to have respondents from China (covering more than one city).

Product/service

- A. Select a company that you are interested in working on. Come up with a list of 10-15 products made by that company and its competitors. Ideally, these should be products that someone in your group actually uses. Note that these should be products, not brands. For example, you can choose Coca-Cola Classic, but not Coca-Cola brand. You may have drunk Coca-Cola Classic, Vita Lemon Tea, Mr. Juicy, Bonaqua water often in the past 7 days. That would constitute four products for your list.
- B. Choose one of the following options for your project:
 - Option One: select one product and upgrade it. E.g. change the formulation and packaging of Coca-Cola Classic.
 - Option Two: introduce a new product (e.g. Coke Zero) as a line extension under the same brand of one of the identified products (e.g. Coca-Cola Classic).
 - Option Three: introduce a new product for the company (e.g. Coca-Cola) as a new brand (e.g. Minute Maid).

Qualitative research

- A. We will pair your group with another group who will serve as participants for three 30-45 minute one-on-one discussions, or a 1.5 to 2 hour focus group. Please prepare a one page discussion guide for the qualitative research that you propose to conduct.
- B. Ask yourself what needs are satisfied by each of the 10-15 products from step b of the product/service section. For example, Coca-Cola Classic can meet your need for refreshment. Vita Lemon Tea can meet your need for cooling. Mr. Juicy can meet your need for nutrition. Bonaqua water can meet your need for rehydration. Each of you can write down your answers before you share with the group. In total, you should have about 3-5 consumer needs that these 10-15 products satisfy.
- C. Discuss as a group and choose two dimensions along which to organize the products. Label the x-axis and y-axis accordingly.

- D. Categorize products by similarity along the two dimensions you selected. The closer the products are to each other, the more similar they are, and the further away they are from each other, the more dissimilar.
- E. Look at the map, and then determine the “intended” positioning of the new product/service for the company.
- F. Develop a concept for the new product/service, based on discussion among all students in a group.

Quantitative research

- A. You can use convenience sampling, which is both inexpensive and fast (Malhotra 2014, p.377). However, the resulting sample is not representative of any definable target population, as the sampling process suffers from selection bias, which means the individuals who participate in a convenience sample might have characteristics that are systematically different from the characteristics that define the target population (Malhotra 2014, p.377). You can also consider quantifying the different needs that the product/service category will satisfy.
- B. Evaluate the appeal of the concept developed for the new product/service, and compare its appeal with the current product/service concept of a competitor.

3. Questionnaire

Please prepare and submit a questionnaire for your research project, before you start the quantitative research.

4. Research report

Please include the following parts adapted from Malhotra (2020, p.728-729).

1. Title page
2. Executive Summary
 - A. Major findings
 - B. Conclusions
 - C. Recommendations
3. Problem Definition
 - A. Background to the problem
 - B. Statement of the problem
4. Approach to the problem
5. Research design
 - A. Type of research design
 - B. Information needs
 - C. Data collection from secondary sources
 - D. Data collection from primary sources
 - E. Scaling techniques
 - F. Questionnaire development and pretesting
 - G. Sampling techniques
 - H. Fieldwork
6. Data analysis
 - A. Methodology
 - B. Plan of data analysis
7. Results
8. Limitations and caveats
9. Conclusions and recommendations

10. Exhibits

- A. Questionnaires and forms
- B. Statistical output

Please use the following formatting for the report:

File Type: Word.

Font: 12 point, Times New Roman.

Text [Including references]: Double-spaced, left-justified.

Page Layout: Use 1-inch margins on all sides with page numbers in the lower right corner and no header/footer.

Page Maximum: 15 pages, properly formatted and inclusive of everything.

5. Group Presentation

- A. Each group will be required to give a professional presentation in class.
- B. 15 minutes for presentation, and 3 minutes for questions and answers.
- C. Please use PowerPoint for your presentation.
- D. More than half of the students in a group should present.
- E. All groups should send their PowerPoint to the teaching assistant before the first group presents.
- F. The order of groups for presentations will be determined randomly.

Peer Evaluation For Group Project

Full Name: _____ Group Name: _____

Below, please write the names of all **other** group members (don't write your name). Next to each member's name, write down the percentage of effort not including your own that he or she contributed to the task. The sum of other group member contributions should equal 100%. For example, if your group has six people, you will write down the names of the other five people in your group. If everybody contributed the same amount of effort, they should each get 20%. If someone contributed more, they should get more than 20% (and someone else should get less than 20%).

	<u>NAMES</u>	<u>PERCENTAGE</u>
1		
2		
3		
4		
5		
6		
7		
8		

TOTAL = 100%

Who contributed the most to the project?

A. I cannot come up with a name

B. The name is _____

Other comments:
