THE MARKETING RESEARCH PORTFOLIO: A PEDAGOGICAL ALTERNATIVE FOR IMPROVING STUDENT PERFORMANCE

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ABSTRACT

The purpose of this paper is to present the marketing research portfolio as an alternative to the content and project-based approaches to teaching marketing research. The content-based approach is focused on covering a large breadth of marketing research material with multiple outcomes assessed at intervals during the course; the project-based approach is focused on issues primarily related to survey research culminating with a group project as the main course outcome. First, the relative merits of these two traditional approaches are discussed. This is followed by the presentation of the marketing research portfolio. A preliminary assessment of the marketing research portfolio that finds improvement in both student exam performance and course evaluations are provided along with further considerations for academics that wish to adopt this innovative learning approach.

INTRODUCTION

Regardless of what they teach, academics are faced with the challenge of how best to design a given course. When it comes to marketing, perhaps one of the more formidable courses for both instructors and students is marketing research. The goal of a marketing research course is to provide students with the skills needed, both quantitative and qualitative, to work in the field of marketing research or to understand and use research information (Stern and Tseng 2002). Marketing research, a required course for the marketing major in most business programs (Dobni and Links 2008), unfortunately is feared by many students due to its perceived difficulty and statistical nature (Bridges 1999). Generally speaking, many marketing students find quantitative subjects less appealing than theory-based subjects (Bove and Davies 2009) and view courses utilizing statistics as anxiety provoking (Stork 2003).

The two basic approaches to teaching marketing research are the content-based approach and the project-based approach (Burns and Bush 2010). These two approaches imply a "breadth" versus "depth" tradeoff. The content-based approach focuses on covering "as many marketing research concepts as possible over the term" (Burns and Bush 2010, p. 10), with students being assessed primarily through examinations. This is comparable to a survey course in which breadth of information is chosen over depth. Conversely, the project-based approach usually focuses on issues related to conducting survey research culminating with a group project. The instructor is likely to have to eliminate, or at best pay little attention to, some research topics in order to spend sufficient time on other topics necessary to complete the group project and thus defaults to a depth-over-breadth approach.

An analysis of marketing research syllabi found on the American Marketing Association's website and in marketing research textbook instructor manuals (e.g., Burns and Bush 2010; Churchill and Brown 2007; Malhotra 2007) reveal some common themes. These syllabi overwhelmingly indicate some form of group research project as a primary course requirement. Only one syllabus appears to employ a pure content-based approach. The majority's reliance on group projects initially seems indicative of a project-based approach to teaching. However, a closer review of class syllabi suggests that the instructors intend to guide students through all aspects of the marketing research process mirroring the content outlines found in typical marketing research textbooks. While a research project is required, a survey approach to covering the material is indicated. In essence, the student is presented a breadth of content, yet is assessed primarily based on a project that requires significant depth of knowledge in specific areas.

If an actual research project is viewed as an important outcome of a marketing research course is there a way to design a project such that it incorporates the many traditionally important content areas as a function of doing the research project? Can this be done in a manner that capitalizes on the strengths and minimizes the weaknesses of both the content- and project-based approaches? The purpose of this paper is to present such a technique, the marketing research portfolio, which seeks to promote active or experiential learning throughout the course. The marketing research portfolio is an innovative alternative to the traditional approach to teaching marketing research which typically focuses on the project report as the primary course outcome.

In the sections to follow, the relative merits of the traditional marketing research project are discussed. This is followed by the presentation of the marketing research portfolio. The paper concludes with a preliminary assessment of the technique and further considerations for academics who wish to adopt this innovative learning approach.

THE TRADITIONAL MARKETING RESEARCH PROJECT

Traditional marketing research projects have been looked upon favorably because they provide students with an opportunity for experiential learning. According to Humphreys (1981), this approach to learning, within the context of a marketing research course, has several pedagogical advantages. First, it provides the opportunity to integrate lecture material into a live case setting. Second, it emphasizes marketing research as a process and not a series of independent concepts/techniques. Lastly, students become active, self-directed participants. Regardless of student learning styles, active learning experiences are seen as more effective than passive alternatives (Karns 2006). This effectiveness results from increased levels of both critical thinking among students and interaction between students and faculty (Wheeler 2008). Another positive aspect of this approach is the development of desirable skills such as problem solving, communication, and analytical analysis (Malhotra, Tashchian, and Jam 1989).

For all the advantages associated with the traditional marketing research project, there are several disadvantages. According to Humphreys (1981) "the major disadvantage of using actual projects is that the instructor faces substantially more operational problems than with other approaches" (p. 8). For instance, prior to the start of the course, clients must be identified and screened. Further, expectations of and interactions with clients must be managed throughout the process. Similarly, course design also presents operational challenges with feedback suggesting that students often feel that they do not possess sufficient skills to begin a marketing research project until near the end of the term resulting in high stress levels and poor quality of work. Traditional marketing research projects rely heavily on survey design and subsequent data collection and analysis. Based on the previously mentioned syllabus review, these are skills that typically are not addressed until well into the second half of a course. This problem is exasperated during shortened summer and mini-terms.

The extensive requirements of a comprehensive project typically result in group assignments. The pedagogical intent of placing students into groups is to provide a cooperative learning experience (Laverie, Madhavaram, and McDonald 2008) and allow them to polish teamwork and communication skills necessary for success in today's workplace. Further, it allows the project work-load to be shared by all members. The practical objective from the faculty perspective is to make feedback and grading possible within the course time period. However, the resulting outcome of a group project is often dissatisfaction and frustration (Lancellotti and Boyd 2008). At times, this negativity overshadows what should be a positive learning experience (e.g., McCorkle et al. 1999; Krug 1997; Lancellotti and Boyd 2008). Faculty can end up spending much time and energy counseling dysfunctional groups as opposed to dealing with actual core content group questions. Compounding the problem is that many faculty members are not trained to provide guidance on such interpersonal issues (Colbeck et al. 2000). These negative group dynamics can result in disengaged students.

Another concern with group projects is whether the group's grade is indicative of each individual's abilities. While always a concern in group projects, this becomes particularly troublesome with a marketing research project. A group project may inadvertently allow students to avoid developing skills in weak or deficient areas. For instance, it has been these authors' experience that a student who has difficulty analyzing data will avoid involvement in that stage of the group project instead of conquering the challenge.

Lastly, the presence of a group project has become the norm in many business courses. With so many group projects and the inherent difficulties associated with them, students often react negatively to the announcement of a group project in a course. This initial negative mindset may set the tone for the term resulting in another learning obstacle.

THE MARKETING RESEARCH PORTFOLIO

Given these numerous concerns with the traditional project-based approach and realizing that a pure content-based approach is generally inappropriate due to its lack of emphasis on active learning, the authors began the search for a new innovative approach to teaching undergraduate marketing research. The course was developed around a marketing research portfolio. This approach addresses the dual goals of sufficient breadth of content coverage and maximization of each student's active learning experience.

A marketing research portfolio is a collection of active learning assignments that challenge the students to utilize the material covered throughout the course. As is common with the majority of marketing research courses, the course syllabus is designed with a content-based approach. The marketing research portfolio components are intended to mirror the material covered in class so that as soon as a topic is covered the students are applying that topic in their portfolio work. The faculty member also has the luxury of discussing the outcomes of various components during the course of the semester allowing students to better grasp the process of marketing research.

The overall research portfolio grade constitutes a reasonably large portion of the course grade, e.g., 30 percent. Based on the syllabus review, this is similar to the weight given to a typical marketing research project. Each student completes a series of components to satisfy the research portfolio requirement (e.g., these authors require 12 components). The portfolio is submitted to the instructor for grading at three points during the semester. The due dates are chosen so that the instructor can grade and provide feedback prior to each of the three course examinations.

Several immediate advantages are realized upon the introduction of the marketing research portfolio. Student stress is reduced since they are not required to complete a group project for the course. Further, increased accountability is apparent since each student's grade is dependent primarily on his or her individual performance and hiding in a large group is not an option. Lastly, for both students and faculty, the workload and subsequent feedback are evenly distributed across the semester.

The twelve components used by the authors, the corresponding classroom topic and the purpose of the components are summarized in Table 1. In addition, corresponding sample assignments are presented in the section to follow. Where noted, individuals are allowed to work in pairs on some aspects of certain components to promote the development of teamwork skills to achieve the pedagogical advantages of group work.

SAMPLE MARKETING RESEARCH PORTFOLIO COMPONENTS

Component #1 – Identify and Critique Marketing Research Studies: To get students thinking about marketing research, they are provided examples of marketing research studies in the context of the classroom discussion. Instructors are encouraged to choose exciting studies to engage the students. For instance, instructors might consider recent articles on neuroscience's use in marketing, a topical Gallup poll, or the U.S. Census. In class, the basic research design is discussed and critiqued, and students are encouraged to question the manner in which the research was conducted. This discussion includes, but is not limited to, an examination of the purpose of the research, the data collection approach, sample utilized and conclusions drawn.

After this initial classroom discussion, students are presented with Component #1 in which they are asked to locate two market research studies. In addition to including copies of the studies in their portfolios, students are required to summarize and critique the research, pointing out any questions or concerns they might have with respect to the particular study under examination.

Component #2 – Research Request Agreement: In this component, students prepare a Research Request Agreement for a client. The particular client and scenario can be customized by the instructor for his or her students. *Example assignment:* These instructors extend the "Barbeque Blues Sauce Company" case found in Churchill and Brown's *Basic Marketing Research, 6th edition*. The case, as presented in the text, is discussed in class and then students are presented with the following challenge:

> *You have been approached by Shamara Williams, owner of the Barbecue Blues Sauce Company, to conduct research investigating the following decision problem: "Why are sales of my two barbeque sauces, Barbeque Blues and Barbeque Blues Chicago Style, declining? I introduced Chicago Style to increase my overall sales, and instead have seen them plummet." Prepare a typed* ***Research Request Agreement*** *explaining to your client how you propose to investigate this problem.*

Component #3 – Projective Techniques: This particular component allows students to explore projective techniques. This has turned out to be one of the most popular components in the research portfolio. The focus of the projective techniques can be varied (for instance, McDonalds as opposed to Southwest Airlines), but if all students are focused on the same topic, quite lively discussions of results in class may occur.

> *Example Assignment: One form of exploratory research utilizes projective techniques. Chapter 5 highlights these various projective techniques (i.e., word association, sentence completion, storytelling, role playing, and cartoon tests). As a consultant for Southwest Airlines, you are to design an exploratory study that utilizes a projective technique or combination of projective techniques.*
>
> You need to do the following:
>
> 1. *Identify what you would like to find out with this brief research study. Choose objectives that seem, logically, to be of interest to Southwest Airlines.*
> 2. *Design the survey instrument (or researcher guide) that you will hand out to your respondents.*
> 3. *Administer your survey instrument to 5-10 respondents. (Or if it is not a self-administered survey, conduct the research with 5–10 participants.)*

TABLE 1
MARKETING RESEARCH PORTFOLIO COMPONENTS

Portfolio Components	Corresponding Classroom Topics	Purpose of Components
Component #1: Identify, critique studies	Introduction to Marketing Research and Problem Definition	To get students thinking about marketing research
Component #2: Research Request Agreement	Introduction to Marketing Research and Problem Definition	To teach students how to design a Research Request Agreement for a client
Component #3: Projective Techniques	Research Design	To allow students to explore the projective techniques
Component #4: Depth Interviews	Research Design	To expose students to the depth interview technique
Component #5: Experimental Design	Research Design	To help students apply the basics of experimental design
Component #6: Secondary Data	Data Collection Methods	To teach students about secondary data gathering
Component #7: Scaling & Measurement	Data Collection Methods	To instill in students basic scaling and measurement issues
Component #8: Observational Research	Data Collection Methods	To expose students to observational research
Component #9: Survey Critiques	Data Collection Forms	To teach students the process of survey design
Component #10: Sampling Plan	Sampling and Data Collection *	To help students learn about sampling
Components #11 & 12: Data Analysis & Results Reporting	Research Reports *	To teach students about the process of data analysis and how to report results

**Students receive experience with data collection and research reports in other components as well.*

4. *In addition to turning in your completed data collection instruments, turn in a brief, typed report that highlights the purpose of your research, identifies what you did, summarizes your results, and concludes with what your results mean for Southwest Airlines.*
   Have fun with this!!!!! Hint: If you are unfamiliar with Southwest Airlines, spend a few minutes "surfing" the company's website at [www.southwest.com].

Component #4 – Depth Interviews: The ground work for this component begins as an in-class assignment. The value of depth interviews is discussed in class, and in small groups of 3-4 individuals, students begin work on a depth interview guide. The focus of the depth interview guide can be customized by the instructor. For instance, one particular semester there were many movie buffs in class, so the depth interview topic sprung from their preand post-class discussions of movies. There is often much debate within the groups as to how to approach these interviews.

Example Assignment: You have completed a draft of a depth interview guide during class. The purpose of this guide is to find out about consumers' movie viewing habits, behaviors, and preferences. For component #4, you are to edit and significantly improve upon this draft, and then conduct depth interviews.

1. *Turn in a typed copy of your new and improved depth interviewing guide.*
2. *Use this guide to interview two individuals.*
3. *In a typed report, summarize the findings from your depth interviews. In hindsight, would you change any of the questions on the interview guide? Why or why not? What other problems or challenges did you encounter when conducting depth interviews?*

Component #5 – Experimental Design: Experimental design should be an engaging marketing research topic. However, students often get overwhelmed by the minutia of variable manipulation and measurement. This component helps them apply the basics of experimental design. It can be more effective if completed by pairs of students and also can be enhanced by including actual data collection and preliminary analysis.

Example Assignment: You have been hired as a consultant by General Motors. They are interested in uncovering how automobile showroom conditions (independent variable) impact consumers' attitudes toward the automobiles on display (dependent variable). You are to propose <u>two</u> experiments that would investigate this cause and effect relationship. Outline your proposed experimental designs. Further, address the four basic issues in experimental design (manipulation of the independent variable, selection of the dependent variable, assignment of subjects, control the extraneous variables) as they relate to your proposed experiments.

Component #6 – Secondary Data: Secondary data gathering is a critical skill for marketers. However, it can be daunting to the student. If it can be approached as hands-on with students in front of computers and actual sources of secondary data for them to explore, it is much better received. This component follows from work begun in the classroom and requires students to consult multiple sources of information and synthesize their findings. In the example below, students were asked to explore the retailer "Trader Joe's" and help make an expansion decision.

Example Assignment: *You had an opportunity in class to begin searching for secondary data on Trader Joe's. For Component #6, you will continue this search. Specifically, you are to compile a report that addresses the following:*

1. *<u>Provide an overview of Trader Joe's.</u> This overview should go beyond the information found on the company website. You must decide what should go in this section (approximately 1–2 pages double-spaced).*
2. *<u>Address the competitive and/or industry situation and relevant trends</u>. In what industry does Trader Joe's compete? Who do they compete against? What is important to know about the industry and competition? (approximately 2–3 pages double-spaced)*
3. *<u>Choose one of the three geographic areas under investigation and craft a compelling argument as to why Trader Joe's should expand to the area or should not expand to the area.</u> We examined Southeastern Louisiana, Birmingham and Houston. Pick one of these areas. Referencing appropriate information from your research, discuss whether this is an attractive expansion opportunity for Trader Joe's (approximately 1–2 pages double-spaced).*

Component #7 – Scaling and Measurement: Issues of measurement are critical to successful market research. This component forces students to address basic scaling and measurement issues. It is divided into two parts. Instructors can choose to take this component further by asking students to use their questions to collect data and discuss the similarity/dissimilarity of findings.

Example Assignment: Part I – The four scales of measurement are nominal, ordinal, interval, and ratio. Consider the five concepts listed below. For each concept, define it further if necessary. Next, write a question using each of the four types of scales that will tap into this concept (i.e., for each concept, you will write one nominal question, one ordinal question, one interval question, and one ratio question).

1. *Attendance at NBA basketball games during the 2009–2010 season.*
2. *Satisfaction with the food at the university cafeteria.*
3. *Level of stress experienced by university students during a typical fall semester.*
4. *Favorite snack food.*
5. *How much does one spend on living expenses during a typical month?*

*Part II – In class, we have discussed many self-report attitude scales. For each of the three concepts listed below, present three potential survey questions each using a different self-report attitude scale. (**Note:** There may be duplication of scale type between the three concepts, but not within the three concepts. For instance, you may use a Likert scale for concept 1 and a Likert scale for concept 2. But you cannot use two Likert scales for concept 1).*

1. *Attitude toward McDonalds.*
2. *Likelihood to purchase a new automobile during 2011.*
3. *Importance of tuition/fees when choosing a university.*

Once you have written three questions for each concept go back and review these questions. For each concept, identify which question you like the best and would include on a survey. Explain your choices.

Component #8 – Observational Research: Another favorite component of students is the one that challenges them to design and conduct observational research. This is one of two components (see experimental design) that may be conducted in groups of two. The pairing of students allows for an assessment of inter-rater reliability.

Example Assignment: As a consultant for the university, you are to design an observational research study that will better help the client understand its student population.

You need to do the following:

1. *Identify what you would like to find out with this research study. The key to good observational research is to be specific as to what you will be observing. Also, identify where on campus you will be conducting your research.*
2. *Design the observation form that you and your partner will use to record your observations.*
3. *You are to complete a total of 40-50 observations (whether you are doing this individually or in a group of two).*
4. *In addition to turning in your completed forms, turn in a brief, typed report that highlights the purpose of your research, identifies what you did, summarizes your results, and concludes with what your results mean for the university. Have fun with this!!!!!*

Note: You may work with one other person on steps 1–3 and in compiling the results. Everyone must complete step 4 on their own. If you work with someone else, please identify that person in your report. Turn in only the observation forms that you complete with your portfolio. You do not need to turn in copies of the each other's forms.

Component #9 – Survey Critiques: To begin the thought process associated with survey design, it can be helpful to examine existing surveys and address the strengths and weaknesses associated with them.

Example Assignment: Locate two different surveys/questionnaires. In a typed report, critique each of these surveys. What problems do you have with each survey? What do you like about each survey? Overall, is each survey a good or bad survey? In addition to the report, please turn in copies of the two surveys.

Component #10 – Sampling Plan: To focus students on basic sampling issues and theory, students must propose the following to the food service company on campus:

Example Assignment: Company X runs all of the on-*campus dining services for the university. The manager is interested in surveying all of his stakeholders (consider who eats or would potentially eat on-campus) to find out how satisfied/dissatisfied they are with company X's current operations and to gauge interest in other potential food service offerings. You have been put in charge of writing a report for company X's manager that will address various sampling options. Specifically, address the following in* your typed report:

A. *Define the population.*
B. *Explain why conducting a census would be impractical. Or if you think it is practical, explain why.*
C. *Propose two non-probability sampling approaches that might be used to help the manager accomplish his research objectives. Be specific in your recommendations. Address the method of data collection that you envision (i.e., personal interviews, Internet, etc.), the sampling frame and exactly how the sample will be chosen.*
D. *Repeat part "C," but in this section, you are to propose two probability sampling approaches.*
E. *Make a final recommendation to the manager about which of the four proposed sampling plans should be implemented. Make the assumption that company X has a very limited budget for this research.*

Components #11 and #12 – Data Analysis and Results Reporting: The final two components focus on data analysis and results reporting. These components have been presented in two ways and have both been found to be equally effective. Students can design a short questionnaire and build their own small data set to analyze, or the instructor can provide the students with a larger existing data set. In either case, students should be guided to consider the research objectives and how best to link the results of the data back to these objectives. Clear communication of findings also should be emphasized.

PRELIMINARY ASSESSMENT OF THE MARKETING RESEARCH PORTFOLIO

To assess the effectiveness of the marketing research portfolio, students' grades under the traditional project versus portfolio approach to teaching marketing research were examined. Individual student grades for four sections of marketing research (n = 82 students) in which a traditional project was used were compared to three sections of market research (n = 39 students) in which the marketing research portfolio was utilized. All sections of marketing research were taught by the same instructor using the same textbook and basic materials. Exams were primarily multiple-choice and generated using the publisher-provided textbook resulting in significant overlap in exam questions. Interestingly, the average grade received on a traditional project was not significantly different ($\alpha = .349$) than the average grade received on the portfolio. However, an improvement in exam performance is seen among those students who completed the marketing research portfolio ($\alpha = .057$). The average exam grade for students completing the portfolio was 79.8 percent compared to 76.1 percent for those completing a traditional project.

In addition to examining student performance, students' evaluations of the course also were considered. One of the three sections (n = 14 students) that completed the portfolio could not be included in this assessment since the university did not provide summer teaching evaluations for that term. While many measures are included on the course evaluation form (e.g., instructor monitored class attendance), only those measures directly related to student learning outcomes and overall teacher effectiveness were included in this assessment. Table 2 provides the six relevant measures and corresponding evaluations. All six measures improved with four showing significant ($p < .05$) improvement upon implementation of the portfolio. The authors caution that this is only a preliminary assessment of this approach and is subject to the typical limitations of a pre-experimental design in a field setting (see Harrison and List 2004; Malhotra 2007, pp. 230–231). Still, the findings of this initial assessment are encouraging and strongly suggestive of a positive improvement in the course relative to both student learning and course evaluations when the marketing research portfolio is utilized.

CONCLUSIONS AND FURTHER CONSIDERATIONS

The summer 2008 term saw the development of the marketing research portfolio. At the time, this was viewed as a one-time experiment, but given the success of the portfolio (as deemed by both the instructor and students),

TABLE 2
PRELIMINARY ASSESSMENT OF STUDENTS' COURSE EVALUATIONS

	Average Evaluation by Students Completing a Traditional Project	Average Evaluation by Students Completing a Portfolio	Significance Level of Independent Sample T-test
Course assignments/ activities challenged me.*	4.5211	4.800	.030
Instructor stimulated my interest.*	4.4085	4.8400	.003
Graded work addressed course content and skills.	4.6429	4.8000	.223
I am more knowledgeable as a result of this course.	4.5634	4.7727	.122
I would recommend this instructor to other students.*	4.5493	4.8636	.021
Overall, the instructor is effective in this course.*	4.6197	4.9091	.015

* Statistically significant difference between traditional project and portfolio students.
** All statements are evaluated on a 5 point scale with 5 = Almost Always and 1 = Never.

the approach has become a permanent fixture in the undergraduate marketing research class and is being fine-tuned and customized by multiple instructors in the program. The advantage to the marketing research portfolio is that its various components address the necessary breadth of a research class, but also give the students a certain depth and skill set development in these same areas as they apply the content knowledge. Marketing educators strive to use innovative, active learning pedagogical techniques in the classroom in an attempt to improve teaching effectiveness (Badrinarayanan and Madhavaram 2008; Shanahan, Hermans, and Haytko 2006). Further, when students prefer a pedagogical technique that is used in class, their class attendance and exam grades may be higher than when a less preferred method is used (Beets and Lobingier 2001). Indeed, exam grades and student engagement have improved since the portfolio's implementation.

Interestingly, marketing research course evaluations traditionally have been reported to be among the lowest in any marketing department (Bridges 1999). Upon implementation of this course approach, course evaluations were seen to rise. Both solicited and unsolicited feedback from students reinforces the course evaluations. Along with greater depth of knowledge and skills across a broad spectrum of content, perhaps, the most positive take-away for the students has been their finished portfolio. They realize that they have a substantial binder documenting their individual research capabilities and are excited about using this during subsequent job searches.

As with any teaching innovation, the implementation itself becomes a learning experience for the instructor. These instructors find themselves constantly improving on the portfolio. For instance, to further strengthen the students' understanding of the research process, it is suggested that a continuous theme for all components be considered. Each semester the instructor might consider one particular company (e.g., Southwest Airlines) and industry (e.g., the airline industry). By rotating this theme, the likelihood of students relying on work completed by others' in previous semesters is also diminished. Further, instructors must give great thought to the three deadlines for turning in the portfolio and synchronize these dates with the dates of the exams. The effectiveness of the marketing research portfolio is tied, in part, to the students receiving timely feedback prior to being tested on the material.

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