Chapter 19
Report Preparation and Presentation
Focus of this Chapter

• Report Preparation
• Oral Presentation

Relationship to Previous Chapters

• Marketing Research Process (Chapter 1)

Relationship to Marketing Research Process

1. Problem Definition
2. Approach to Problem
3. Research Design
4. Field Work
5. Data Preparation and Analysis
6. Report Preparation and Presentation

Figure 19.1 Relationship of Report Preparation and Presentation to the Previous Chapters and the Marketing Research Process
Figure 19.2  Report Preparation and Presentation: An Overview
Opening Vignette

Importance of the Report and Presentation

The Report Presentation and Presentation Process
(Fig 19.3)(Table 19.1 & 19.2)

Report Preparation (Fig 19.4, 19.5, 19.6 & 19.7)
- Format
- Writing
- Tables
- Graphs

Oral Presentation and Dissemination

Research Follow-up

Application to Contemporary Issues (Fig 19.8)
- International
- Social Media
- Ethics
Importance of the Report & Presentation

For the following reasons, the report and its presentation are important parts of the marketing research project:

1. They are the tangible products of the research effort.
2. Management decisions are guided by the report and the presentation.
3. The involvement of many marketing managers in the project is limited to the written report and the oral presentation.
4. Management's decision to undertake marketing research in the future or to use the particular research supplier again will be influenced by the perceived usefulness of the report and the presentation.
Figure 19.3 The Report Preparation & Presentation Process

1. Problem Definition, Approach, Research Design, and Field Work
2. Data Analysis
3. Interpretation, Conclusions, and Recommendations
4. Report Preparation
5. Oral Presentation
6. Reading of the Report by the Client
7. Research Follow-up
Report Format

I. Title page
II. Letter of transmittal
III. Letter of authorization
IV. Table of contents
V. List of tables
VI. List of graphs
VII. List of appendices
VIII. List of exhibits
IX. Executive summary
   a. Major findings
   b. Conclusions
   c. Recommendations
x. Problem definition
   a. Background to the problem
   b. Statement of the problem

XI. Approach to the problem

XII. 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
Report Format (Cont.)

XIII. Data analysis
   a. Methodology
   b. Plan of data analysis

XIV. Results

XV. Limitations and caveats

XVI. Conclusions and recommendations

XVII. Exhibits
   a. Questionnaires and forms
   b. Statistical output
   c. Lists
Report Writing

- **Readers**
  A report should be written for a specific reader or readers, for example, the marketing managers who will use the results.

- **Easy to follow**
  The report should be easy to follow. It should be structured logically and written clearly.

- **Presentable and professional appearance**
  The looks of a report are important.
Report Writing (Cont.)

- **Objective**
  
  Objectivity is a virtue that should guide report writing. The rule is, "Tell it like it is."

- **Reinforce text with tables and graphs**
  
  It is important to reinforce key information in the text with tables, graphs, pictures, maps, and other visual devices.

- **Terse**
  
  A report should be terse and concise, yet, brevity should not be achieved at the expense of completeness.
Guidelines for Tables

- **Title and number**
  Every table should have a number (1a) and title (1b).

- **Arrangement of data items**
  The arrangement of data items in a table should emphasize the most significant aspect of the data.

- **Basis of measurement**
  The basis or unit of measurement should be clearly stated (3a).
Guidelines for Tables (Cont.)

- Leaders, rulings, spaces
  Leaders, dots or hyphens are used to lead the eye horizontally, impart uniformity and improve readability (4a).
  Instead of ruling the table horizontally or vertically, white spaces (4b) are used to set off data items.
  Skipping lines after different sections of the data can also assist the eye.
  Horizontal rules (4c) are often used after the headings.
Guidelines for Tables (Cont.)

- **Explanations and comments: Headings, stubs, and footnotes**
  Designations placed over the vertical columns are called headings (5a).
  Designations placed in the left-hand column are called stubs (5b).
  Information that cannot be incorporated in the table should be explained by footnotes (5c).

- **Sources of the data**
  If the data contained in the table are secondary, the source of data should be cited (6a).
<table>
<thead>
<tr>
<th>Business Segment</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Business</td>
<td>53,624</td>
</tr>
<tr>
<td>Personal Systems Group</td>
<td>35,305</td>
</tr>
<tr>
<td>Imaging and Printing Group</td>
<td>24,011</td>
</tr>
<tr>
<td>HP Financial Services</td>
<td>2,673</td>
</tr>
<tr>
<td><strong>Total</strong>*</td>
<td><strong>115,613</strong></td>
</tr>
</tbody>
</table>

*Total adds to 115,613 rather than 114,552 reported in Table 19.2.

Source: The 2009 Annual Report. Hewlett-Packard Company
Guidelines for Graphs: Geographic and Other Maps

- Geographic maps can pertain to countries, states, counties, sales territories, and other divisions.
<table>
<thead>
<tr>
<th>Year</th>
<th>Net Revenue ( Millions of Dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>86,696</td>
</tr>
<tr>
<td>2006</td>
<td>91,658</td>
</tr>
<tr>
<td>2007</td>
<td>104,286</td>
</tr>
<tr>
<td>2008</td>
<td>118,364</td>
</tr>
<tr>
<td>2009</td>
<td>114,552</td>
</tr>
</tbody>
</table>

Source: The 2009 Annual Report, Hewlett-Packard Company
Guidelines for Graphs: Pie Charts

- In a **pie chart**, the area of each section, as a percentage of the total area of the circle, reflects the percentage associated with the value of a specific variable.
- A pie chart is not useful for displaying relationships over time or relationships among several variables.
- As a general guideline, a pie chart should not require more than seven sections.
Figure 19.4 Pie Chart of 2009 Hewlett-Packard Revenues by Business Segment

- Enterprise Business: 46%
- Personal Systems Group: 31%
- Imaging and Printing: 21%
- HP Financial Services: 2%
Guidelines for Graphs: Line Charts

- A **line chart** connects a series of data points using continuous lines.
- This is an attractive way of illustrating trends and changes over time.
- Several series can be compared on the same chart, and forecasts, interpolations, and extrapolations can be shown.
Guidelines for Graphs: Line Charts (Cont.)

- A **stratum chart** is a set of line charts in which the data are successively aggregated over the series.
- Areas between the line charts display the magnitudes of the relevant variables.
Figure 19.5
Line Chart of Hewlett-Packard’s Total Revenues

Net Revenue ($ millions)
Guidelines for Graphs: Pictographs

- A **pictograph** uses small pictures or symbols to display the data.

- Pictographs do not depict results precisely, hence, caution should be exercised when using them.
Figure 19.6 Pictograph of Hewlett-Packard Sales

2009  $$$$$$$$$$$$$$$$
2008  $$$$$$$$$$$$$$$$
2007  $$$$$$$$$$$$$$$$
2006  $$$$$$$$$$$$$$
2005  $$$$$$$$$$$$

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Guidelines for Graphs: 
Histograms and Bar Charts

- A **bar chart** displays data in various bars that may be positioned horizontally or vertically.

- The **histogram** is a vertical bar chart and in which the height of the bars represents the relative or cumulative frequency of occurrence of a specific variable.
Figure 19.7
Histogram of Hewlett-Packard’s Total Revenues

Net Revenue ($ millions)

2005 2006 2007 2008 2009
Guidelines for Graphs: Schematic Figures and Flowcharts

- **Schematic figures** and **flow charts** take on a number of different forms. They can be used to display the steps or components of a process, as in Figure 19.3.

- Another useful form of these charts is a classification diagram. Examples of classification charts for classifying secondary data were provided in Chapter 4 (Figures 4.3 and 4.4).
Oral Presentation

- The key to an effective presentation is preparation.
- A written script or detailed outline should be prepared following the format of the written report.
- The presentation must be geared to the audience.
- The presentation should be rehearsed several times before it is made to the management.
- Visual aids, such as tables and graphs, should be displayed with a variety of media.
- It is important to maintain eye contact and interact with the audience during the presentation.
Oral Presentation (Cont.)

- Filler words like "uh," "y'know," and "all right," should not be used.
- The "Tell 'Em" principle is effective for structuring a presentation.
- Another useful guideline is the "KISS 'Em" principle, which states: Keep It Simple and Straightforward (hence the acronym KISS).
- Body language should be employed.
- The speaker should vary the volume, pitch, voice quality, articulation, and rate while speaking.
- The presentation should terminate with a strong closing.
Reading the Research Report

- **Addresses the Problem** – The problem being addressed should be clearly identified and the relevant background information provided.

- The **research design** should be clearly described in non-technical terms.

- **Execution of the Research Procedures** – The reader should pay special attention to the manner in which the research procedures were executed.

- **Numbers and statistics** reported in tables and graphs should be examined carefully by the reader.
Interpretation and Conclusions – The interpretation of the basic results should be differentiated from the results per se. Any conclusions or recommendations made without a specification of the underlying assumptions or limitations should be treated cautiously by the reader.

Generalizability – It is the responsibility of the researcher to provide evidence regarding the reliability, validity, and generalizability of the findings.

Disclosure – The reader should carefully examine whether the spirit in which the report was written indicates an honest and complete disclosure of the research procedures and results.
Research Follow-Up

- **Assisting the Client** – The researcher should answer questions that may arise and help the client to implement the findings.

- **Evaluation of the Research Project** – Every marketing research project provides an opportunity for learning and the researcher should critically evaluate the entire project to obtain new insights and knowledge.
International Marketing Research

- Report preparation can be complicated by the need to prepare reports for management in different countries and in different languages.
- In oral presentations, the presenter should be sensitive to cultural norms. For example, telling jokes, which is frequently done in the United States, is not appropriate in all cultures.
- Different recommendations might be made for implementing the research findings in different countries.
Marketing Research & Social Media

- Social media, particularly blogs and Twitter, can play a crucial role in disseminating the results and the report of a marketing research project and the decisions made by the company based on the findings.

- Blogs can also provide an avenue for a company to obtain consumer reaction to the research findings as well as their feedback on the decisions made and actions taken by the company based on the research findings.
Marketing Research & Social Media (Cont.)

- Social media research results can be effectively presented using charts and graphs such as the *Twitter trends’ statistics graph*.
- Social media community members’ stories can often be effective illustrations of statistical findings when used in reports or executive presentations.
Ethics in Marketing Research

- Ethical issues include ignoring pertinent data when drawing conclusions or making recommendations, not reporting relevant information (such as low response rates), deliberately misusing statistics, falsifying figures, altering research results, and misinterpreting the results with the objective of supporting a personal or corporate viewpoint.

- The researchers should prepare reports that accurately and fully document the details of all the procedures and findings.
Clients also have the responsibility for full and accurate disclosure of the research findings and are obligated to employ these findings honorably.

Ethical issues also arise when client firms, such as tobacco companies, use marketing research findings to formulate questionable marketing programs.
SPSS Windows

- While the normal graphs can be produced using the Base module of SPSS, for more extensive graphing, the DeltaGraph package can be used. This package has extensive graphing capabilities with 80+ chart types and 200+ chart styles.

- Likewise, SPSS Tables enables the researcher to create even complicated tables. For example, the results of multiple response tables can be condensed into a single table. The researcher can create a polished look by changing column width, adding boldface, drawing lines, or aligning.
SPSS Windows (Cont.)

- SPSS OLAP cubes are interactive tables that enable you to slice your data in different ways for data exploration and presentation.

- SmartViewer enables the researcher to distribute reports, graphs, tables, even pivotal report cubes, over the web. Company managers can be empowered to interact with the results by putting a report cube on the Web, intranet, or extranet. Thus, they can answer their own questions by drilling down for more detail and creating new views of the data.
Acronym: Tables

The guidelines for constructing tables can be described by the acronym TABLES:

T itle and number
A rrangement of data items
B asis of measurement
L eaders, rulings, spaces
E xplanations and comments: headings, stubs, and footnotes
S ources of data
Acronym: Graphs

The guidelines for constructing graphs can be described by the acronym GRAPHS:

G - Geographic and other maps
R - Round or pie chart
A - Assembly or line charts
P - Pictographs
H - Histograms and bar charts
S - Schematic figures and flowcharts
Acronym: Presentation

The guidelines for making a presentation can be summarized by the acronym PRESENTATION:

P preparation
R rehearse your presentation
E eye contact
S stories, experiences, examples, and quotations
E equipment: multimedia
N no filler words
T tell ’em principle
A audience analysis
T terminate with a strong closing
I interact with the audience
O outline or script should be prepared
N number-one level manager should sponsor it

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