SAGE Secondary Data Analysis

Using Secondary Data in Marketing Research: A Project that Melds Web and Off-Web Sources

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Using Secondary Data in Marketing Research: A Project that Melds Web and Off-Web Sources


A marketing research project that is designed to answer research questions based on secondary data is described. The project incorporates Web sources without denigrating the traditional off-Web sources of secondary data. First, a review of the literature highlights the importance of becoming a knowledge worker in the new economy, the value of projects in marketing research courses, and the need to incorporate off-Web sources in projects. After project objectives are provided, the project is completely described. Project problems and some possible solutions are offered, followed by a brief discussion of the evaluation of the project. The project could be adapted for other courses in marketing.

Few people doubt the often-repeated mantra: information is power in the 21st century. Gary Hamel, corporate CEO and best-selling author, put it this way: “We have gone from an industrial economy to a knowledge economy” (Hamel 1999, p. 4).
How can an individual (e.g., a university marketing student) best position oneself in this new environment? Jeremy Rifkin (1995) suggests that “knowledge workers,” those in our society who “use the most recent information technology to identify, process, and solve problems,” are being elevated “to center stage in the global economy. They are fast becoming the new aristocracy” (p. 175). These knowledge workers are “the creators, manipulators, and purveyors of the stream of information that makes up the postindustrial, post-service global economy” (p. 174). Rifkin assigns them credit and responsibility for keeping our high-tech economy running.

How do these knowledge workers get information? In marketing research, it is understood that there are two basic information collection methods: primary and secondary (McDaniel and Gates 2001). By conducting primary marketing research (e.g., surveys, focus groups, experiments, observation research, in-depth interviews), decision makers can in effect create new knowledge to add to their information array. This is one area in which knowledge workers need to develop skills.

Secondary Data Sources

However, the rules of efficiency espoused in most marketing research textbooks (e.g., Churchill 1999; McDaniel and Gates 2001) suggest that primary research not be the first step. Conventional wisdom sums it up this way: “Before undertaking any primary research study, marketers should complete an exhaustive search of existing or secondary data” (Cross 2000, p. 97). In essence, why create new knowledge using primary data collection if that knowledge already exists and can be found using secondary sources?

Knowledge workers must develop skills in recovering many sources of secondary data. These include, for example, the use of internal databases and information systems, government documents, industry and trade association publications, news sources, and published studies and articles. Historically, these sources were generally found in hard copy or on CD-ROM disks.
Much of the secondary information just listed is now available on the Web. The next generation of knowledge workers (our marketing students) must learn how to access these Web sources in an efficient and effective manner. In most marketing programs, the marketing research class is where these Web research skills will be developed and fine-tuned. The skills will then be applied in other courses and, of course, in the student’s professional marketing career. How best to teach those skills is the subject of the next section.

The Use of Projects and Hands-On Experiences

According to Bridges (1999), the marketing research course is historically an unpopular one. Students often complain of the statistics and data analysis portion of the course and see the subject material as being relatively boring, especially when compared with more exciting marketing courses such as advertising. What can be done to improve students’ perceptions of the course? Results of focus groups and surveys found that more hands-on experience and computer work are what students want (Bridges 1999). In fact, when asked for the preferred class time allocation, students suggested that 29% of the course should be hands-on and computer work.

Marketing professors are responding to this preference by making greater use of hands-on projects and activities (Smart, Kelley, and Conant 1999). These experiential learning exercises, so called because learning and knowledge are created through experiences (see Kolb 1984), are receiving a great deal of press in the marketing education literature (e.g., Bobbitt et al. 2000; Graeff 1997; Titus and Petroshius 1993; Williams, Beard, and Rymer 1991). The use of experiential learning exercises seems to reflect the sentiments of one writer who said, “A school is not a factory. Its raison d’être is to provide opportunity for experience” (http://annabelle.net/topics/school.html). Using projects and hands-on exercises to teach Web marketing research skills thus seems to be a wise investment.
It is not surprising that many marketing educators have already embraced the use of information technology assignments and projects in their classrooms to teach skills (e.g., Atwong and Hugstad 1997; Miller and Mangold 1996; Rubel 1996; Siegel 1996; Siu 1997). As Rudenstine (1997) commented, “The Internet has distinctive powers to complement, reinforce, and enhance some of our most effective traditional approaches to university teaching and learning” (p. A48).

Marketing professors should not jump into experiential exercises and projects, however, just because everyone else is doing so, or without a great deal of thought and planning. As one well-respected educator stated, “Trainers who use experiential approaches run the risk of designing programs that may delight their creators but give nightmares to the actual participants” (Becker 1998, p. 78). Thus, any marketing research projects should be developed with the participants’ needs in mind. To avoid student nightmares, Becker suggests two general principles: (1) empathize with your students by asking yourself, “Would I like to go through this myself?” and (2) make sure the proposed exercise is essential to the goals of the training.

Is the Web “Everything”?

While the Web is growing daily in terms of the secondary information available, an important question must be addressed: should marketing research professors view the Web as replacing all traditional sources of secondary marketing research information? Should projects assigned only include the Web? One practitioner lamented,

Many students and scribes seem to think that once they have scoured the Web, they’ve done all the homework they need to do. Web research is so easy, and off-Web research so hard, that the search for knowledge tends to cease at the boundaries of cyberspace. (Manes 1999, p. 210)

Leibovich (2000) echoes this sentiment: “When the Internet emerged, educators had to teach their students how to determine the authenticity of a site. Now they have to teach students how to refine their searches – and when to look offline for information” (p. G1).
She claims that for many students, “the idea of roaming library stacks is as quaint as the thought of writing with a quill pen. Even though libraries are organized and easily navigated, students prefer diving into the chaotic whirl of the Web to find information” (p. G1).

There are many reasons to include skill development in off-Web information sources in a marketing research project: the material that is available off-Web simply may not be on the Web; the Web site (e.g., Forbes) often does not include the images and tables of print media; at other times, the Web only includes the tables without the accompanying discussion (e.g., TableBase®); material is often on the Web today/gone tomorrow, so it can be hard for [p. 74 ↓ ] someone to later verify information; many of the fee-based Web sources (e.g., *Standard and Poor’s Industry Surveys*) may already be available for free in the library in hard copy; and sometimes it can be much easier to find the hard copy of material in the library than it is to find the correct URL on the Web. In summary, there are times when efficiency and effectiveness dictate that knowledge workers access off-Web sources (e.g., Neal 2000).

The challenge is to develop a marketing research project that incorporates the Web without throwing out the traditional off-Web sources of secondary data.

The Project

The project described here has been developed over an 8-year period. For the past 5 years, the Web component has been an integral part of the project while not denigrating the importance of off-Web sources.

Project Objectives

The project actually seeks to achieve a number of objectives. The goals are to have the student achieve the following:

These objectives are designed to achieve results not only in the marketing research class but in other venues as well (e.g., other classes, their career). In fact, the
objectives were developed after consulting with other marketing faculty as to whether these skills are covered in earlier classes, as well as what skills will be needed in the student's upcoming classes. This project is capable of improving quantitative analysis and computer skills (Ramocki 1987) in addition to generating more student involvement and action (Malhotra, Taschian, and Jain 1989).

Administering the Project

Before discussing project administration, it might be helpful to see how the project fits in with other semester activities. In addition to traditional class lectures and exams, students are involved in three major projects:

- Project 1: secondary data acquisition and evaluation,
- Project 2: developing the methodology and instrument for a survey, and
- Project 3: inputting and analyzing data using SPSS and writing a formal written report.

The three projects are interwoven throughout the semester with the lectures and exams. The class size is limited to 36 students.

An example of the secondary data project from one semester is provided in Table 1. In all semesters, the project is based on a product or service that has real competitors in the marketplace. According to the project scenario, this new product is being introduced to the market within the next few months, and managers need information to help in their decision making.

Before handing out the project assignment, students are engaged in a traditional classroom lecture on secondary data. Topics covered include sources of secondary data as well as how to evaluate those sources for accuracy, authority,
objectivity, currency, and coverage. Examples are provided that clearly illustrate that all sources are not equally trustworthy. The lecture concludes with a discussion of how to conduct hidden company research (i.e., for nonpublicly traded firms) using secondary sources.

At the end of the class lecture, the project is assigned. Students are allowed to work as individuals or in a team of up to three students. It is made clear that expectations are greater for teams.

Note from Table 1 that the project requires the student to provide information in six basic areas. First, students are required to locate the recent sales history for the industry. This is often a more difficult task than it would seem. Quite often it is easy
to find something close (e.g., sales history in tons or cases, instead of dollars, or just one or two data points). In those instances, students are encouraged to keep digging and see if they can find a better source of secondary information that will more closely match the requirements of the project. Students who are accustomed to taking classes with assigned cases, which usually include lots of tables of data and information, learn that in the real world, it is often very hard to find the information needed.

Second, students must identify the major competitors and indicate their relative size. For some projects, this is easier than in others. Students must deal with the complexities of the results of mergers and acquisitions as they look at information that scans a wide time frame (e.g., last year's competitor becomes this year's partner, thanks to a merger of the two firms). Students are also required to identify which competitors are direct and which are indirect, providing an opportunity to use concepts they learned in the principles of marketing course.

Third, students must identify environmental influences that could affect the success of the new venture. Here, students must find information about current federal, state, and local laws; laws that are being proposed or discussed as possibilities; international treaty and tariff rules; cultural factors; and trends and fads. Students are able to draw on concepts they learned in business law, economics, principles of marketing, and liberal education courses, among others. There is generally a wealth of information in this section, and the challenge for the student is to not become overwhelmed.

Fourth, students must forecast dollar industry sales for the next 5 years. Sometimes they can find a secondary information source that provides at least part of this information. Again, as often as not, the information they find is incomplete or stated in the wrong units of measurement – for example, train car loads instead of dollars, although nondollar estimates can be very useful for forecasting. However, the challenge is to see if the student can find exactly what the manager is asking for. If students cannot find all this information, they are required to make an estimate. Students are encouraged to use the tools they learned in other courses (e.g., production and operations management courses, sales management, principles of marketing) to derive a forecast. It is encouraging to watch a student develop an elaborate mathematical model, \([p. \text{78} \downarrow]\) learned in another course, to make these estimations. However, even
students who have not yet taken the other courses can use simple averaging to arrive at some estimate of the forecast.

Fifth, segments that could be used as target markets must be identified. For consumer products, some indication of this can come from off-Web secondary sources such as Simmons Study of Media and Markets, which provides information on usage and attitude patterns by many demographic variables (Simmons Market Research Bureau 1985). For industrial products, segmentation is usually based on type of usage, amount of usage, type of buying process (new task, modified rebuy, straight rebuy), and so on. Census information is often helpful in this section to identify the location and size of various demographic groups. Also, information from the third section of the paper (e.g., trends, fads, cultural factors) helps to define viable segments. The key is that students identify segments based on secondary data sources, not merely on intuition.

Sixth, students must develop a 5-year forecast for this new product or service. Indicators for how a product such as this may sell often come from articles, tables, and annual reports describing similar new products launched in the marketplace in the past. Students can also break down the industry sales forecast (section 4) into the expected sales that the different firms might experience based on past sales history for those firms and their brands.

After collecting these six basic pieces of information, the project requires the student to identify what primary research is necessary. This section forces students to think about the relationship between primary and secondary data. For information they could not find, primary data collection may be the only alternative, assuming of course that the benefits of the information collected in the primary study are worth more than the costs of collecting that information. Note that students are not asked to actually conduct the primary research, merely to list what that research should seek answers to.

Once the students have a good grasp of the parameters of the project, it is time for them to learn to use the secondary sources of information at their disposal. To facilitate this, the class meets with the business librarian, who provides hands-on instruction in a computer lab in the use of Web and off-Web resources and helps those who are less computer literate get up to speed (e.g., saving files, cutting and pasting between applications, etc.). One librarian has developed an award-winning Web site
to help marketing research students; it can be found at http://www.d.umn.edu/~jvileta/mktgresearch.html. This Web site includes both Web and off-Web sources. In the lab, students develop skills in how to come up with keywords to use in researching various secondary sources, how to conduct narrowed searches on the Web using traditional search engines (e.g., Alta Vista), what the various subscriber databases (e.g., Lexis-Nexis, ABI Inform) include and how to best use them, and what off-Web resources their library has for the project.

Now that students have been exposed to the various sources, it is time for them to actually start the project. It is helpful to spend a class meeting in the library early on, forcing the students to start the project. Yes, some will still procrastinate and try to complete the project at the last minute, but at least they will have all started the project early and have some sense that progress has begun – this seems particularly important for this kind of project, which can seem overwhelming until one just starts it. The early meeting in the library also helps students discover the basic problems they are going to have. During this library meeting, the instructor should walk among the students, encouraging them to look at off-Web sources, helping students who are trying to find things on the Web, and answering questions about the project. Although it is impossible to work with each and every student in this session, students see the instructor providing assistance and realize that the instructor really does want to help them succeed in the project. In the next classroom meeting, a discussion ensues of the problems they encountered during the library visits and possible solutions.

At this stage, students are assigned to work on the project outside of class. In class, we begin covering text material related to Project 2, and students work on Project 2 during class time. However, the first few minutes of each class session are provided as an opportunity for the class to ask questions or discuss problems with the secondary data project (Project 1).

Several weeks after the classroom visit to the library, students are required to submit a written status report for the secondary data project. This report includes a complete listing of all references found to date (to make sure they are working diligently on the project), what percentage of each section they have completed, and what problems they
still have. After reviewing this information, the instructor leads a class discussion about the issues presented. This seems to be a better approach than simply asking, “Does anyone have any problems with the project?” By this time, some students fear that other class members must be further along than they are, making them somewhat reluctant to voice their concerns. After discussing all concerns, the class once again meets in the library. This provides an opportunity for the instructor to offer hands-on help with Web problems as well as to explain how to interpret some off-Web source that a student might not understand.

While sometimes the project has been presented to the instructor in written form, it is generally preferable that an oral presentation of the findings be made because of the opportunity for the students to respond to follow-up questions about what they found and why they did what they did (e.g., forecasting, segments chosen). These oral presentations are restricted to a 10-minute time limit to teach students how to be extremely concise, realize the importance of practicing the presentation carefully to strategically cover all sections of the project, and use handouts to cover and reinforce items that cannot be discussed fully in a short presentation.

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Recall that one objective of the project was for students to improve their communication skills. Thus, the grade reflects their oral communication skills and effective use of handouts and supporting material. While most of these skills have been developed in other courses (e.g., lower-division public speaking and communications courses), this material is also covered in a lecture several weeks before the project is due. Most marketing research textbooks have a chapter or large section in the text that clearly explains how to effectively engage in an oral presentation. Students are also provided with examples of projects from prior classes (e.g., handouts, copies of overheads, videotapes) so they can see how others approached the project. The examples are provided after our initial library visit.

Students are encouraged to submit their presentation (the written report or the handouts/copy of overheads) 1 week before the due date for feedback and suggestions. Usually only two or three avail themselves of this opportunity.
Finally, it should be noted that all students must turn in their presentation materials on the same date/time. For oral presentations, that includes a hard copy of their overheads (or PowerPoint slides) and any handouts that they would normally give the decision maker during or at the conclusion of their oral presentation. The instructor informs students that when she or he sits down to watch their actual presentation, it must follow what they handed in exactly (i.e., there is no opportunity to add additional items or findings after the materials are handed in). These policies and procedures ensure that all students are fully prepared to give their presentations at the same time, thus making it less likely that later presenters have an unfair advantage over those who have to present first. It also allows the instructor to see exactly what all students have found and thus compare their sources and successes at finding the required information, even before the first oral presentation begins.

Students give their presentations during regularly scheduled class time but in a different room from the one assigned for the class. The only observer is the instructor. This allows the rest of the class members (who are not currently giving their oral presentation) to be working in their teams on Project 2.

Project Problems and Solutions

Students Frustrated Because they Cannot Find Information to Answer Research Questions

One solution to this problem is to inform the students that it will probably be impossible to locate every piece of information required. Explain that is simply the way it is in the real world. While it would be nice to go to a free secondary source and retrieve the information, sometimes the information just does not exist.

[p. 81 ↓]
Next, give them a strategy to follow if they cannot find the information. My experience is that students have often only looked at Web sources, and they are encouraged to look at both Web and off-Web resources. Students sometimes seem reluctant to use off-Web resources, perhaps because off-Web sources do not appear as current and fresh as Web sources (e.g., the copy your library owns of *Standard and Poor’s Industry Surveys* might be 2 years old). Explain that although the off-Web resources might be a little dated, they can still provide a piece of information that can be used to help predict what the actual numbers are.

With regard to Web sources, it is sometimes necessary to help students refine their skills in using search engines and the subscriber databases that the library has access to. An attempt is made to reinforce lessons learned from the seminar offered by the business librarian.

Students are also told that they are not alone in their difficulty in finding things on the Web. Empirical research conducted at Ohio State University has shown that finding correct information that is actually on the Web can sometimes be almost impossible (Dye 1999). Dye (1999) found the correct answer to a research question only 27% of the time, while the wrong answer was discovered 9% of the time. Sixty-four percent of the time, the Web pages listed by the search engine were actually out of service.

Students are instructed that resources are growing each day. For example, the Web adds several thousand new sites every day (Fleischman 1996). While it may not help them with this project, it is important for them to realize that in future projects, perhaps on the job, the same kind of information might be available.

**Students Frustrated at Finding Too Much Data**

While it is frustrating to find no data, it can be equally frustrating to find too much information. Hamel (1999) concurs, lamenting that often while doing research, “We are drowning in data but not producing any great insight” (p. 3). This is more prone to happen if the project was chosen on a particularly hot topic (e.g., genetically modified
crops, any product that has been shown to harm the environment) for which a lot of discussion and information is available. To prevent some of this frustration, the instructor can talk about this issue when the project is first assigned. Students need to be taught to secure information that is complete but not necessarily exhaustive. For example, it is not important for them to get 15 articles, all of which say essentially the same thing. Students also need to be taught how to identify which items need to be photocopied versus just writing down the key point discovered. Students often fall into the trap of wanting to photocopy everything and then do not actually need a large percentage of what they have copied due to redundancy [p. 82 ↓] and nonapplicability. Finally, students are reminded not to collect information that is merely interesting but does not actually answer one of the research questions.

Even though these items were discussed in class when the project was handed out, it helps to remind students both during in-class discussions and office conversations. Many students do not seem to learn the material until they have to struggle with completing an actual issue and project, which is one reason the project was designed in the first place.

Key Books Go Missing or are Checked Out

If there is an off-Web source that has the answer to one or more of the research questions, there can be a desire on the students’ part to secure that information and then hide the book somewhere in the library so that other students cannot locate it. In that way, they hope to be the only one with the correct answer and somehow get a better grade. Fortunately, this has only happened a few times. One solution would be to put the book on reserve. That seems to defeat the purpose, however, of having the students discover the resource on their own.

The instructor can attempt to avoid this situation by telling students that all reference sources cited are going to be carefully looked at. If one student is the only one to find a particular source, the instructor can go to the library and try to locate it. If unable to do so, the instructor would be very suspicious of that student.
Some books that the student needs may be checked out. The solution is to remind the students to start the project early, rather than waiting until the last minute.

**Students Tend to want to Be Hand-Held**

This can be one of the most frustrating aspects of any project that is not 100% structured and easy for students to complete. It seems that students in their college experiences have often been given projects in which the answers, even though perhaps a little difficult to produce, nonetheless were guaranteed to exist. The project described here does not have that guarantee.

Since many are experiencing this real-world phenomenon for the first time, they understandably want to be provided with more assistance, which the instructor should be happy to provide. What the instructor should not do, however, is perform the research for them. It is important to teach the students the value of struggling to come up with the answers on their own.

A related issue is the students’ use of library staff at the reference desk. While the instructor should certainly have no problem with students using this staff to help the students learn how to use and understand a resource or to locate a book, the instructor should frown on the staff essentially doing the research for the student. This is difficult since the staff seems to want to actually locate the information the student is searching for. This issue can perhaps best be approached by talking with the library staff about the project and asking them to assist but not actually do the work for the students. This has worked fairly well over the years.

**Access to Computers and the Web**

This used to be a bigger issue than it is now. Each year, more labs are opened, and more and easier access to the Web is available. Still, depending on the timing, it can be difficult for students to have the access they need. As a result, students are given 5 weeks to complete the project.
Student Cheating

Cheating on the college campus is widespread (Allen, Fuller, and Luckett 1998; Phillips and Horton 2000) and has even been labeled an epidemic (Nonis and Swift 1998). It is equally troubling to know that those who cheat in college are more likely to cheat later in their lives (Roig and Ballew 1994).

Consistent with the advice advocated by Phillips and Horton (2000) to reduce cheating, I have a written policy on cheating in general (and plagiarism in particular), stated clearly in the syllabus and on the project itself.

The bulk of cheating occurs across school terms, instead of within the term (Karlins, Michaels, and Podlogar 1988). Therefore, efforts should be made to reduce the recycling of work turned in by students in previous semesters. As a result, the instructor should change the project each and every semester, making intersemester cheating impossible.

To help reduce within-semester cheating, during the question-and-answer portion of the oral presentation, the instructor can ask specific questions about sources cited. For example, if a student claimed to have looked at Hoover.com, the instructor can ask the student to relate what that Web site looks like, what kinds of information is available on it, and so on. If the student does not remember, the instructor can ask similar questions about other references. Just knowing that the instructor is going to do this probably keeps many students from cheating.

Instructor cannot Find Answers to the Research Questions

As mentioned earlier, sometimes the answers cannot be found. In that case, the instructor simply has to find the best sources available to answer the research questions. Of course, the instructor can make it easy on himself or herself by first
locating good information and then assigning a project topic that asks for that information.

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In addition to conducting some research personally, the instructor may also use the students’ status reports to help identify good sources of information for the project.

**Instructor Must Keep Up-to-Date on Constantly Changing Resources**

This does take time. Search engines change their protocol. Databases that are subscribed to by the university are added, dropped, and changed constantly. Off-Web sources are continually added and old ones deleted or replaced by better ones.

While it would be easy to simply state that instructors of marketing research are morally obligated to keep up with the field they teach in, it is understood that the time to do so must come from somewhere. Most instructors do not want to have their knowledge and skills outdated, but time pressures make keeping up that much harder.

It is suggested that instructors work with their library staff to keep them up-to-date on changes. Many universities have assigned library staff by functional area, so an instructor may already have an expert at his or her disposal. I have found them to be quite helpful over the years and willing to teach whatever needed to be learned. Also, universities’ information technology units and special teaching development units usually offer free seminars to help keep faculty up-to-date with regard to technology and teaching-related issues. These seminars include topics such as changes in search engines, how to use specific subscriber databases, how to use new off-Web resources in the library, and so on. Once the instructor has learned the basics, it is much easier to keep up with the incremental changes that occur.
Evaluation of the Project

An evaluation of the effectiveness of this project takes several forms. The primary mechanism is a confidential evaluation form. The first six items of this form are from Bobbitt et al. (2000), while the remaining six items are project specific. Students generally feel the project is useful and that the objectives have been accomplished. The project does take time, with students reporting spending an average of 25 hours on the project (standard deviation of 9.7 hours).

Responses to an open-ended question for this project (“Please make any comments you wish”) include such statements as the following:

Finally, unsolicited feedback from alumni provide further evidence that the project has met its stated objectives. Comments include statements such as the following:

Summary

A number of authors (Chonko 1993; Lamp, Shipp, and Moncrief 1995) have criticized the exclusive reliance on traditional methods of information dissemination (e.g., use of classroom lectures only). As marketing research instructors, we must not merely talk about how to do marketing research, but we must also help students develop their own research skills.

The project described has successfully developed marketing research students’ skills in melding Web and off-Web sources for secondary data collection. It is hoped that other marketing research instructors will benefit from such a project.

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The approach suggested in this article could also be adapted for other courses as well. A similar project could be assigned in courses such as principles of marketing, consumer behavior, advertising, business to business, and other courses.
Atwong and Hugstad (1997) predicted that “marketing graduates who can operate deftly in a computer-mediated environment should gain a competitive edge over those who are less sophisticated in adapting to this rapidly growing environment” (p. 44). It is hoped that the project described will help our students become adept knowledge workers in the 21st century.

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