

## 8. Report preparation and presentation

### 8.1 Chapter summary

In this chapter we focus on the last two aspects of marketing research process: report preparation and presentation. One of the important aspects of any research project is to assist managers in decision making process and lot depends on how the researcher communicates the findings of the research project to the managers. If the results of the research are not effectively communicated to the manager, the decision making process may not be as sound as expected. An effective research report can overcome this challenge. This chapter therefore, will focus on how to write a research report which can be easily understood by manager as well as can help in decision making process as desired. We shall focus on the issue of content, format, layout and style.

### 8.2 Importance of marketing research report

As discussed in the summary above, marketing research report is the bridge between researcher and manager with regard to the research findings. Even if the research project is carried out with most meticulous design and methodology, if the research results are not effectively communicated using the research report to the manager, the research project may not be a success. This is because the research results will not help in achieving the major aim of any research project, which is to support the decision making process. Research report is a tangible output of the research project and not only helps in decision making but also provides documentary evidence and serves as a historical record of the project. Many a times, managers are only involved in looking at the research report (i.e. oral presentation and written report) and therefore most times the research project is judged by the quality of the research report. This has direct association with the relationship between the researcher and manager. All of the above reasons suggest the importance of marketing research report.

### 8.3 Reporting the results: key issues to remember

Before communicating the results of the project to the manager, the researcher should keep several issues in mind for effective communication. The first and foremost rule for writing the report is to empathize. The researcher must keep in mind that the manager who is going to read and utilize the findings of the research project might not be as technically knowledgeable with statistical techniques or at times with the methodology. Furthermore, the manager will be more interested in knowing how results can be used for decision making rather than how they have been derived. Therefore, the jargons and technical terms should be kept at minimum. If the jargons cannot be avoided, then researcher should provide a brief explanation for the manager to understand it.

The second rule researcher should keep in mind is related to the structure of the report. The report should be logically structured and easy to follow. The manager should easily be able to grasp the inherent linkages and connections within the report. The write up should be succinct and to the point. A clear and uniform pattern should be employed. One of the best ways to check whether the structure of the report is sound or not, the report should be critically looked at by some of the research team members.

Furthermore, researcher must make sure that the scientific rigour and objectivity is not lost when presenting the research project findings. At times, because of the heavy involvement of researcher in the overall research process, it is possible that there is a loss of objectivity. Therefore, researcher should keep a tab on the aspects of objectivity of the overall report. Many times managers do not like to see the results which oppose their judgemental beliefs however the researcher must have the courage to present the findings without any slant to conform to the expectations and beliefs of the managers.

A professionally developed report is always well received as it makes the important first impression in manager's mind. It is therefore very important for researcher to focus on the presentation of the report. The other important aspect is the use of figures, graphs and tables. There is an old saying that, 'a picture is worth 1000 words' and that is quite true when reporting the results of a research project. Use of figures, graphs and tables can help in interpretations as well as greatly enhance the look and feel of the report which in turn can augment the reader engagement.

If the report is prepared keeping in mind the above stated key issues, the overall credibility of the research report as well as of the researcher can be greatly enhanced.

## 8.4 Generic marketing research report

A professional marketing research report must focus on several issues including (a) effective communication of findings to the manager; (b) provide sound and logical recommendation on the basis of the findings; and (c) develop report in a manner that it serves for future reference.

As the client needs, research problem definition, research objectives and methods vary for each situation, every marketing research report is unique in its own sense. However, many parts of the basic format of any marketing research report remains generic. Following provides the format for a generic marketing research report.

1. Title page
2. Table of contents
3. Executive summary
  - a. Research objectives
  - b. Brief discussion on methodology
  - c. Major findings
  - d. Conclusion
  - e. Recommendations

4. Introduction
  - a. Problem definition
5. Research design
  - a. Type of design used
  - b. Data collection
  - c. Scaling techniques
  - d. Questionnaire development and pilot testing
  - e. Sampling
  - f. Fieldwork
6. Data analysis and findings
  - a. Analysis techniques employed
  - b. Results
7. Conclusion and recommendation
8. Limitations and future directions
9. Appendices
  - a. Questionnaire and forms
  - b. Statistical output

As one can observe, the above stated format closely resembles with the marketing research process itself. In the discussion below we will focus on each of the above stated generic parts of a marketing research report.

### **Title page**

The title page indicates the subject of the report, information regarding researcher and his/her associations and the name of the recipient, along with organizational details. The title should reflect the nature and objective of the project succinctly.

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**Table of contents**

The table of contents should list the topics covered with appropriate page numbers. In most reports, only major headings and subheadings are included. It is also common to provide list of tables and figures after the table of contents.

**Executive summary**

The executive summary is a very important part of the overall report. Many consider it the soul of the report and it has been observed that at times executives only read the summary of the report and decide on the quality of the report as well as sometimes take decisions only on the basis of the summary. The executive summary therefore is a brief and meticulously prepared part of the overall report. The executive summary should focus on: (a) why and how the research was carried out; (b) what was found; and (c) what can be interpreted and acted upon by the manager. Therefore, in most reports executive summary contains research objectives, brief description of methodology employed, major findings, conclusions and recommendations.

**Introduction**

The introduction provides background information necessary for a clear understanding of the report. It may include definition of terms, relevant background details for the project (sometimes using secondary data analysis), and scope of the research. Furthermore, it also provides detailed explanation of the research problem and research objectives. After reading the introduction, the reader should know precisely as to what is the research about, why was it conducted, and what gap the research addresses which was not addressed previously.

**Research design**

The research design section of a report focuses on details relating to how the research was conducted. It focuses specifically on what type of research design was used with clear justifications. Furthermore, it explains both secondary and primary data collection processes. It describes how were the measurement scales developed and provide information on their validity and reliability. It further informs the reader about the development of the questionnaire and the pilot testing. It discusses what changes or tweaks were performed and why. This section also describes in details the sampling process including sample population definition, sample size, sample type, and the sampling technique. It further describes the fieldwork procedures employed.

**Data analysis and findings**

In this section researcher should describe the structure of data analysis and various techniques employed to achieve the objectives of analysis without using much technical details and jargons. Many times researchers do get carried away in explaining this in too much technicality. This can make the reader disengaged with the report as they might not be able to grasp what is being said. It is always good to provide the reader with some details regarding why a specific analysis technique was used and how the results can be interpreted.

The sophisticated analysis related data should be provided in appendices for the reader to look at if they are interested in it. The presentation of findings should directly be correlated with the research problem.

It is important to use graphs and tables as they help reader understand the details much easily in most cases. However, unnecessary use of figures and tables should also be avoided.

### **Conclusion and recommendation**

This section is derived out of the findings section and so closely correlates with the analysis and findings section. Conclusions can be considered broad generalizations that focus on answering questions related to the research objectives. They are succinct in nature and provide the reader with a clear interpretation of what the findings convey. Recommendations on the other hand, are generated by critical thinking and are associated with the ability of researcher to suggest the future solutions for the problem. The researcher should use each conclusion derived from the research and critically analyse it before suggesting any recommendations. Recommendations should focus on how the manager can use them to generate competitive advantage.

### **Limitations and future directions**

Most scientific research projects follow a rigorous research approach; however several limitations at times are unavoidable. Common limitations associated with marketing research include sampling bias, time and cost constraints, measurement errors, and so on. As every study is unique in its own way, there are study specific limitations also. Researcher should clearly state the limitations of the project in the report. This also provides an opportunity to the researcher for reflection on the project and how future projects can be improved without the specific limitations relating to the project at hand.

### **Appendices**

The appendices section should include the other relevant details which might be helpful to the reader. The questionnaire form and sophisticated technical analysis should be added in this section also. Cross-referencing should be done within the report so the reader can find this information easily.

## **8.5 What not to do when writing reports**

While the above section discussed how to prepare a good marketing research report one also needs to understand what not to do when writing reports. There are several issues the researchers must keep an eye on. When writing a research report the researchers should make sure that the explanations provided for each aspects of the process. Furthermore, many times it happens so that the researcher in the zeal to describe the phenomena goes over the top with regard to explanation and provides too much detail which disengages the reader. This tends to happen mostly in the analysis part where statistical processes are explained. Sometimes, it has also been observed that researchers are too focused on the packaging, style and format and not the content and substance. This can affect the quality of the report, credibility of the

researcher, and the overall relationship between researcher and manager. With many research projects it has been seen that several other interesting findings are observed. However, when the findings are not relevant with the key research objectives they should be avoided. If included they can confuse the reader and can disengage them.

## 8.6 Report presentation

The presentation has become an integral part of most marketing research projects. Most managers are finding it hard to read the entire report and so prefer the researcher to present the report in an oral presentation. Furthermore, the presentation provides an opportunity for the research and management team to interact the issues of concern and in that way it becomes an important exercise.

For any presentation, the most important aspect is preparation. Researcher should first develop an outline of the presentation keeping the audience in mind. Once the outline is developed, the researcher should focus on the content management and decide as to what is relevant and important and what is not. Use of various audio-visual aids as well as other materials such as chalkboards or flipcharts should be planned out in advance. While audio-visual presentation adds to the overall engagement, chalkboards and flipcharts provide flexibility in presentation.

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The rules regarding what to do and what not to do when writing reports also apply to the presentation and researcher must keep in mind that the presentation is being done for the managers to grasp the results. Researcher must remember that the research was conducted for assistance in decision making and was not a statistical exercise. Therefore, the focus of the presentation should be on how the research can help managers in making a better informed decision.

## 8.7 Conclusion

As discussed in this chapter, the prime objective of any marketing research report is to communicate in an effective manner, the results of the research, so the manager can take informed decisions. Marketing research report provides the communication bridge between the researcher and the manager and that is why it is an important aspect of the overall research process.

It is very important for the researcher to remember that the report is being prepared for the manager and therefore researcher must empathize with the manager in the writing process. The report must be logically structured and easy to follow. The objectivity of the research is also a supreme concern and researcher should oppose inclusion of any judgement beliefs which cannot be supported. The researcher should make sure that the report is well written and looks professional.

The generic marketing research project follows a format which includes title page, table of contents, executive summary, introduction, research design, data analysis and findings, conclusion and recommendations, limitations and future directions, and appendices. Each component of the report has its own importance and should therefore be carefully prepared.

Researcher must make sure that they do not over or under emphasize the relevant issues. It is easy to get carried away when developing research project report. The researcher must focus on managers' needs and should make sure that the report consistently adheres to it. The same rules apply when preparing report presentation which also has become an integral part of any research project.