**Generating Marketing Insights with Social Science**

B7689

Fall 2017

Professor: Robert J. Morais
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Office hours/student consultation by appointment

**COURSE OVERVIEW**

*Course Goal:* To enable students to apply research methods and theory from the social sciences to marketing and become more creative, distinctive, and competitive marketers.

*Course Perspective and Content:* Marketers have increasingly mined social sciences such as anthropology, psychology, and sociology to enhance their customer understanding and generate epiphanies that traditional marketing research cannot deliver. This course takes an in-depth look at applying social science to produce insights about consumers in a qualitative marketing research context. We will cover how anthropological theories about ritual, meaning making, social relationships, beliefs, cultural codes, gift giving, and tribes can inspire marketing strategies and advertising; the value of ethnography as a methodology for gaining consumer understanding and accessing real-time, naturalistic UX; and ways that focus groups and deep probing one-on-one interviews borrow from psychology, anthropology and sociology to tap consumer ideas and sentiments and inform marketing initiatives. We will also draw on related humanities-based disciplines such as phenomenology and semiotics for additional analytic perspectives. Students will gain first-hand field experience with the techniques and theory covered in this course.

**COURSE METHODOLOGY**

* Class Sessions: Lecture, discussion, and student presentations
	+ PowerPoint slides will be posted on Canvas after each class
* Readings: Two books, one short e-book (an extended essay), and several articles
* Student Tasks and Weight (%/points adding to 100)
	+ 1st Project: Observation 10%
	+ 2nd Project: In-depth Interview 10%
	+ 3rd Project: Response to The Moment of Clarity 10% (Team project; All receive same grade)
	+ 4th Project: Brief Ethnography/Epiphany 10%
	+ 5th Project: Draft and Final Project Proposal 10% (Only Final Proposal Graded)
	+ 6th Project: Research Report 30%
	+ Class Participation 20%

* Class Participation: Students should come to class having done the readings and assignments and be prepared to participate in lively class discussions. Participation includes offering an informed point-of-view and listening actively and responding to fellow students. Demonstration of knowledge acquired in assigned readings and our earlier classes, as well as other CBS courses, will be valuable to the class and considered as part of the class participation grade.
* Class attendance: Attendance will be reflected in the overall participation grade. The professor must be informed in advance of any absence that can be anticipated. More than one absence or excessive lateness to class will negatively impact the class participation grade significantly.
* This course adheres to the Columbia Core Culture. Students are expected to be:
	+ *Present*: On time for every class. Attendance will be tracked and is required except for reasonable absences.
	+ *Prepared*: Complete required reading and other work and expect cold calling. Bring and display nameplates.
	+ *Participating*: Constructive participation is essential, as noted above. Use of electronic devices is not permitted unless requested by the professor.

**REQUIRED READINGS**

Books

* *Qualitative Consumer and Marketing Research.* Russell W. Belk, Eileen Fischer and Robert Kozinets. 2013. (Selected chapters will be required)
* *The Moment of Clarity.* Christian Madsbjerg and Mikkel B. Rasmussen. 2014.

E-Book (Extended Essay)

* *Dark Value.* Grant McCracken. 2016. <https://www.amazon.com/Dark-Value-hidden-digital-economy-ebook/dp/B01F6BBIVW>

Articles

* Psychological Needs: <http://knowledge.wharton.upenn.edu/article/why-businesses-should-serve-consumers-higher-needs/>
* Anthropology in Business: <http://www.businessinsider.com/heres-why-companies-aredesperateto-hireanthropologists-2014-3>
* Complementary Approaches: <https://www.researchgate.net/profile/Timothy_Malefyt/publication/277721253_How_Anthropologists_Can_Succeed_in_Business_Mediating_Multiple_Worlds_of_Inquiry/links/5572393d08ae7536374dff9f.pdf>
* Driving: <https://www.epicpeople.org/ethnographic-study-lifts-the-hood/>
* Ritual, Symbolism, Bicycles and Cats: <https://rauli.cbs.dk/index.php/jba/article/view/4896/5317>
* Senses, Ritual, Identity: Shaving: <https://rauli.cbs.dk/index.php/jba/article/view/4787/5214>
* Gift Giving: <https://www3.nd.edu/~jsherry/pdf/1983/Gift%20Giving.pdf> (optional)
* From Marketing Research to Advertising Strategy: <https://www.researchgate.net/publication/314100980_In_Pursuit_of_Strategy_Anthropologists_in_Advertising>

**COURSE ROADMAP**

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| **Date** |  **Topic/Synopsis/Reading/Assignments** |
| Class 19/9/17 | **Introduction and Frameworks for Understanding Consumers**This introductory session will lay out the course roadmap, requirements and expectations, and begin the discussion of how social science can inspire imaginative and highly competitive marketing initiatives.ReadingChapter 2 in *Qualitative Consumer and Marketing Research*<http://knowledge.wharton.upenn.edu/article/why-businesses-should-serve-consumers-higher-needs/><http://www.businessinsider.com/heres-why-companies-aredesperateto-hireanthropologists-2014-3>Discuss 1st Project: Observation **Due:** 9/16/17, 2-3 PPT slides |
| Class 29/16/17 | **Methods I**As an underpinning to the course, we will begin with the first of two sessions on marketing research methodology. We will review the strengths and limitations of qualitative and quantitative consumer research, big v. small data, the what, how and why, of consumer understanding, and consider the pros, cons, and inventive social science-informed approaches to focus groups, in-depth interviews, interactional research and online community marketing research. Students will learn how social science-inspired lines of inquiry such as guided retrospection, deprivation, personification, metaphor elicitation, and triadic sorting can help marketers obtain deep consumer understanding and spark marketing insights. Cases: children’s cereal, emergency contraception, a sore throat remedy. ReadingChapters 3 & 5 in *Qualitative Consumer and Marketing Research*Begin *The Moment of Clarity***Initial Observation due**Discuss 2nd Project: In-depth one-on-one interview **Due:** 9/23/17, 3-5 PPT slides |
| Class 39/23/17 | **Methods II**This session concludes the focus on social science-informed marketing research methodologies. Readings and the class lecture will detail the role of ethnography in the marketing research toolkit, and explain how to conduct ethnography. In addition, we will discuss the value of mixed methods/perspectives for generating consumer understanding and insight. Cases: a floor cleaner, a room deodorizer, and salad dressing. ReadingChapter 4 in *Qualitative Consumer and Marketing Research*<https://www.researchgate.net/profile/Timothy_Malefyt/publication/277721253_How_Anthropologists_Can_Succeed_in_Business_Mediating_Multiple_Worlds_of_Inquiry/links/5572393d08ae7536374dff9f.pdf> Continue *The Moment of Clarity* **In-depth one-on-one interview due**Discuss 3rd Project: Response to *The Moment of Clarity* (Team project)**Due:** 10/7/17, 3-5 PPT slides**No class 9/30/17** |
| Class 410/7/17 | **Marketing Epiphanies****Design**We will spend a good portion of this class on the approaches and cases in *The Moment of Clarity,* which incorporates ideas and methods from the social sciences and humanities. We will also discuss how the social sciences, semiotics, and phenomenology can inform design from a UX perspective. Cases: Transportation, WD-40, Domino’s Pizza.ReadingFinish *The Moment of Clarity*<https://www.epicpeople.org/ethnographic-study-lifts-the-hood/>**Team Responses to *The Moment of Clarity due*** |
| Class 510/14/17 | **Ritual and Meaning Making**This session will define ritual and meaning making from an anthropological perspective and consider how studying consumer behavior in these terms can ignite fresh marketing ideas. Cases: breakfast cereal, cookies, car rentals, bicycles, and cake mix.ReadingRitual, Symbolism and Bicycles <https://rauli.cbs.dk/index.php/jba/article/view/4896/5317> For now, skip the section on cats.Discuss 4th Project: Brief Ethnography/Epiphany, 3-4 PPT slides**Due:** 10/21/17 |
| Class 610/21/17 | **Anthropology and Psychology**This session will contrast two social science perspectives. We will look at how anthropology and psychology informed two different topics in the luxury hotel category: extremely high end “Gold” floors and historical properties. We will also discuss a case that mixes psychologically and anthropologically-informed methods in research on a dog food brand.Class discussion will include the strengths, weaknesses, and marketing implications of each of these approaches. **Brief Ethnography/Epiphany Due**Reading*Dark Value:*  <https://www.amazon.com/Dark-Value-hidden-digital-economy-ebook/dp/B01F6BBIVW> |
| Class 710/28/17 | **More on Anthropological and Psychological Approaches**Expanding on the previous session, we will examine how anthropology and psychology can inform different marketing research projects on pets. Class discussion will include the strengths, weaknesses, and marketing implications of each of these approaches. We will also discuss *Dark Value.*Reading<https://rauli.cbs.dk/index.php/jba/article/view/4896/5317> Focus on the section on cats.Review/prepare for this week’s class discussion on *Dark Value* <https://www.amazon.com/Dark-Value-hidden-digital-economy-ebook/dp/B01F6BBIVW> |
| Class 811/4/17 | **Beliefs, Sensory Experiences, and Identity**We will look at how concepts from anthropology and sociology can enhance marketers’ understanding of consumer beliefs, the need for sensory experiences, and expressions of identity, as well as how these approaches can inform marketing initiatives. Cases: vitamins, shaving, and mouthwash. We will also cover how to write a marketing research proposal, and devote time to discussion of the final project. Discuss 5th Project (Part 1): Marketing Research Proposal Draft **Due:** 11/11/17, 2-3 PPT slidesReading<https://rauli.cbs.dk/index.php/jba/article/view/4787/5214>  |
| Class 911/11/17 | **Cultural Codes**This session will explore how deep analysis of cultural symbolism and codes can generate marketing ideas. Cases: coffee, cars, and diapers. **Proposal Draft Due**Class Discussion of Proposal Drafts and Creation of Final Proposal (Part 2 of 5th Project) **Final Proposal Due:** 11/18/17, 3-5 PPT slides |
| Class 1011/18/17 | **Gift Giving****Tribes** Social exchange as a theoretical construct can be a productive conceptual framework for marketing. We will look at theory and a few cases when marketers were and were not explicitly incorporating ideas about social exchange, including watches, peanut butter, and recipes. This session will also examine whether or the concept of tribes is useful for marketers. Case: Major League Soccer.**Final Project Proposal Due**In-class discussion of 6th (Final) Project based on final project proposals**Due:** 12/9 for all students. Presentations divided among students for 12/9 and 12/16**,** 10-15 PPT slides– **Presentation schedule to be discussed in class.**Reading<https://www3.nd.edu/~jsherry/pdf/1983/Gift%20Giving.pdf> (optional)Viewing <https://www.ted.com/talks/seth_godin_on_the_tribes_we_lead?language=en> **REMINDER:** **No class 12/2/17; Classes 11 and 12 will be pushed back one week.** |
| Class 1112/2/17 | **Class is postponed because I will be at a conference this week. The last two classes will be pushed back on the calendar. Most final presentations will be in class on 12/16.****Work on final project this week.** |
| Class 1212/9/17 | **Marketing Research and Advertising Strategy** This session will cover the mechanics of crafting an advertising strategy informed by social science insights. There will be some student presentations of the final project.Reading<https://www.researchgate.net/publication/314100980_In_Pursuit_of_Strategy_Anthropologists_in_Advertising> Case: Orange Juice**Final Project PPT Slides Due for All****Presentations: Group I** |
| Class 1312/16/17 | **Final Project Presentations: Group II** |

**INCLUSION, ACCOMMODATIONS, AND SUPPORT FOR STUDENTS**

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Date: July 20, 2017