**Qualitative Marketing Research**

B8678

Spring 2019

Professor: Robert J. Morais
rm3075@columbia.edu

201.403.1704

Office hours/student consultation by appointment

TA: TBD

**COURSE OVERVIEW**

*Course Content:* This course provides an in-depth introduction to qualitative marketing research methods as a basis for competitive marketing strategies and execution. We will situate qualitative research within the larger marketing research toolkit by reviewing the strengths and limitations of qualitative versus quantitative research. Students will learn how to craft respondent screeners, research proposals, conduct qualitative research first-hand, create consumer journey maps, and interpret the findings to produce fresh insights. We will cover a wide range of qualitative research methods in detail, including focus groups, in-depth one-on-one interviews, interactional research, and ethnography, looking at ways these techniques can be executed F2F, online, and otherwise. The course will draw on methods and theory from “classic” marketing research, along with valuable methodological and analytic approaches from anthropology, psychology, sociology, phenomenology, and semiotics. There will be ample cases and examples of both method and theory. Students will gain experience with techniques and theory in and outside of class.

*Connection to the Core:*This course connects primarily to the Marketing core course because it details ways to conceive and conduct qualitative marketing research to discover consumer sentiments and behavior, connect them to culture, and produce insights that help grow brands.

**COURSE METHODOLOGY**

* Class Sessions: Lecture, discussion, in-class group assignments
* Readings: Two books and several articles
* Student Tasks and Weight
	+ Project 1: (Individual) Observation 15%
	+ Project 2: (Individual) In-depth Interviews 20%
	+ Project 3: Proposal (Group) 15%
	+ Project 4: Research Report (Group) 30%
	+ Class Participation 20%

Near the end of the course, students will evaluate each other’s performance in their group. Their input will be considered in assigning final individual participation grades. The group project grades will be the same for all members.

* 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.
* 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. This is a six-week class, so attending every class is especially important.
	+ *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 are required, but the entire book is recommended.)
* *The Moment of Clarity.* Christian Madsbjerg and Mikkel B. Rasmussen. 2014.

Articles

* <https://medium.com/ethnography-matters/why-big-data-needs-thick-data-b4b3e75e3d7> or view <https://www.ted.com/talks/tricia_wang_the_human_insights_missing_from_big_data>
* Data Science and Ethnography: <https://www.epicpeople.org/data-science-and-ethnography/>
* Mixed Qualitative Methods: <https://www.researchgate.net/publication/277721253_How_Anthropologists_Can_Succeed_in_Business_Mediating_Multiple_Worlds_of_Inquiry>
* “Connecting Ethnography to the Business of Innovation” (To be provided)
* Shaving: <https://rauli.cbs.dk/index.php/jba/article/view/4787/5214>
* From Marketing Research to Marketing Strategy: Optional reading: *In Pursuit of Strategy: Anthropologists in Advertising.* Robert J. Morais. In *Handbook of Anthropology in Business*. Rita M. Denny and Patricia L. Sunderland, eds. Left Coast Press. 571-587. 2014. Supplied upon request.

**COURSE ROADMAP**

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| **Date** |  **Topic/Synopsis/Reading/Assignments** |
| Class 1 | **Introduction and Frameworks** This session will lay out the course roadmap and requirements. We will situate qualitative research within the larger marketing research toolkit, including quantitative research and big data. We will cover how to determine the right respondents for qualitative marketing research and the process for crafting a screener to recruit respondents for research. In-class exercise: Using qualitative elicitation techniques (word association and ZMET) to access brand perceptions that can lead to quantitative perceptual mapping and brand positioning opportunities.Cases/Examples: Febreze; Howard Schultz as ethnographer; Paco Underhill on retail observation; Trader Joe’s, Tricia Wang on “Thick Data” ReadingChapters 1-2 in *Qualitative Consumer and Marketing Research*<https://medium.com/ethnography-matters/why-big-data-needs-thick-data-b4b3e75e3d7> or view <https://www.ted.com/talks/tricia_wang_the_human_insights_missing_from_big_data>Assignments to be discussed/due the following week:* Choose Final Project Topic (Group Project)
* Observation (Individual Project)
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| Class 2 | **Focus Groups and IDI’s**We will review approaches to focus groups, in-depth interviews, interactional research and online community marketing research. We will consider how basic interviewing techniques and sophisticated methods such as guided retrospection, deprivation, personification, triadic sorting, a range of projective techniques, and customer journey mapping can enable marketers to gain deep consumer understanding and spark marketing insights. In-class exercise: Practice of interviewing techniques.Cases: Honey Bunches of Oats; Targon mouthwashReadingsChapters 3 & 5 in *Qualitative Consumer and Marketing Research*Begin *The Moment of Clarity*We will begin the discussion on the final project assignment in the context of the readings and techniques discussed in class.**Final Project Topic and Observation due.**Assignment to be discussed/due the following week:* In-depth one-on-one interviews (Individual Project)
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| Class 3 | **Ethnography****Writing a Research Proposal**This session will explain the role of ethnography in the marketing research toolkit and provide details on when, why, and how to conduct ethnographies F2F, online, and otherwise. We will discuss how to craft a qualitative marketing research proposal.In-class exercise: Ethnography and WorkshoppingCases/Examples: The Plaza (customer service); Duncan Hines (marketing)ReadingChapters 4 and 5 in *Qualitative Consumer and Marketing Research*Data Science and Ethnography: <https://www.epicpeople.org/data-science-and-ethnography/>Continue *The Moment of Clarity* **IIn-depth one-on-one interviews due.**Assignment to be discussed/due the following week:* Moment of Clarity Prep for Discussion
* Project Proposal (Group Project)
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| Class 4 | **Marketing Epiphanies** **Ethnography for Product Design and Innovation**In class, all of us will dive into *The Moment of Clarity* with group-based analysis and discussion*.*We will consider how ethnography and semiotic thinking can ignite marketing and design ideas.In class exercise: Ethnography as inspiration for new productsCases: Ford and Transportation; WD-40; Domino’s Pizza; Go-Gurt (innovation) Brief examples: Netflix; Airbnb**Group project proposals due.** ReadingFinish *The Moment of Clarity*“Connecting Ethnography to the Business of Innovation” (To be provided) |
| Class 5 | **Qualitative Research, Sensory Experiences and Identity****Mixing Qualitative Methods** We will look at how qualitative research can adapt concepts from anthropology and psychology to enhance consumer understanding and inform marketing initiatives. Cases: Folgers; The Art of Shaving; Revlon; FreshpetWe will discuss the final group project (see below).Reading<https://www.researchgate.net/profile/Timothy_Malefyt/publication/277721253_How_Anthropologists_Can_Succeed_in_Business_Mediating_Multiple_Worlds_of_Inquiry/links/5572393d08ae7536374dff9f.pdf> Shaving: <https://rauli.cbs.dk/index.php/jba/article/view/4787/5214>In-class group discussions of final projects as works in progress. Student groups must come to class prepared to share their progress to date.Assignments to be discussed/due the following week:* Final project (Group)
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| Class 6 | **From Marketing Research to Marketing Strategy****Student Group Presentations**We will discuss how to use marketing research as a foundation for marketing strategy with a focus on advertising strategy. We will spend the remainder of the class on the group project presentations. Case: CadillacReadingChapter 8 in *Qualitative Consumer and Marketing Research*Optional: *In Pursuit of Strategy: Anthropologists in Advertising.* Robert J. Morais. In *Handbook of Anthropology in Business*. Rita M. Denny and Patricia L. Sunderland, eds. Left Coast Press. 571-587. 2014. Supplied upon request.**Final project due. (Group)** |

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January 4, 2019

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