

---

**Consumer Insights**

MKTG 560

M/W 1:30-3:20

**Professor Ann Schlosser**

522 Paccar Hall

[aschloss@uw.edu](mailto:aschloss@uw.edu)

---

**Required Course Materials**

- **Online Textbook (see [canvas.uw.edu](http://canvas.uw.edu)):** *Basic Marketing Research: Volumes 1-3* by Smith and Albaum (hereafter referred to as **Handbook vol.1, vol.2, or vol.3**)
- **Coursepack.** Available at <https://hbsp.harvard.edu/import/816410> (hereafter referred to as **CP**).
- **Course website at <http://canvas.uw.edu>** (hereafter referred to as **Canvas**)
  - You should check this website regularly. Some readings, announcements, Panopto recordings, handouts, assignments, data sets, grades, etc. will be posted here.

**Course Objectives**

The broad objectives of this course are to teach you the ART of research in order to gain valuable consumer insights by introducing you to research methods as employed by better-managed firms and proposed by leading academicians. The course is aimed at the manager who is the ultimate consumer of research and the one responsible for determining the scope and direction of research activities. The techniques of research design, data collection, and data analysis occupy an important space in the work of a marketing manager as well as many other business professionals, such as entrepreneurs (in deciding whether and how to launch new products), and human resource managers (for workforce sizing decision). Indeed, these tools, although tied to the marketing domain, are broadly applicable across a range of research settings. Overall, this course focuses on helping managers recognize the role of systematic information gathering and analysis in order to obtain the customer insights needed to make better decisions.

The quality of the consumer insights that you gather depends on the care exercised in executing the various steps of the research process. The steps include problem definition, research design (exploratory, descriptive and causal), data collection methods, data analysis, and presentation of insights and recommendations. Although we will cover both secondary and primary research as well as qualitative and quantitative research, emphasis is given to primary quantitative research.

Thus, the ultimate goals of this course are that at the end, you will be able to:

- Determine what type of research should (vs. should not) be conducted to answer different marketing questions
- Develop and refine your research design, collection and basic analytical skills
- Effectively implement and communicate all stages in the research process to provide

- valid and reliable consumer insights
- Critically evaluate others' research, analyses and strategic recommendations

### **Class Format**

Due to the remote learning environment for this quarter, class time via Zoom will be devoted to synchronous class discussions where you will apply course concepts covered in the readings to specific questions. Lectures/demonstrations will be taught asynchronously (e.g., through Panopto videos posted on Canvas). You are responsible for all material covered both synchronously and asynchronously.

The handbook is used as a guide and as a reference. Class sessions will be devoted to probing, extending, and applying the concepts covered in the assigned readings and Panopto Recordings. Additional handouts will be made available throughout the quarter on Canvas. The computer and database exercises are designed to give you "hands-on" experience with developing online studies, and with cleaning, analyzing and interpreting research data. Students are expected to have read and analyzed all assigned readings thoroughly prior to class, either alone or in a group.

### **Group Work**

We will divide the class into teams, and the research project will be done within that team. I expect class members to select their own five-person teams. If class enrollment is not divisible by five, group sizes may vary from five, but groups larger than six or smaller than four are strongly discouraged. Each team should strive for diversity. For students who haven't joined a group at the end of the first week, I will assign them to group. At the end of the quarter, you will evaluate each group member's contribution to the research project.

### **Grading Criteria**

Your grade in the course will be based on both individual (I) and group (G) work. Grades will be computed as follows:

A.	Exam (I)	25%
B.	Research Project (G)	35%
C.	Case Analyses (I)	20%
D.	Class Participation (I)	20%

Please note that **late assignments will not be accepted, and the exam will only be administered during the scheduled time/date (unless you have made a prior arrangement with the professor)**. Please ensure that you are available during the dates of the exams, case discussions, and presentations.

Grades will be assigned on the following basis:

>94%	4.0
94%	3.9
93%	3.8, Etc.

### A. Exam (25%)

The exam is an in-class exam administered only during the scheduled time/date and is designed to test your ability to apply material from the assigned readings, class discussion, and any supplementary readings and exercises presented during the course. The exam is closed book and closed notes, although you may use one sheet of paper (8 ½ x 11” double-sided page; typed and/or handwritten). This page of notes must be individually prepared. You must turn in this page via Canvas before the exam. The exam will be completed online during the class period, and you must use Zoom (with your video camera on) during the duration of the exam.

### B. Research Project (35%)

A research field project is an important component of this course. This project will give you an opportunity to design and conduct a full-fledged piece of research in an area of your choosing that has exploratory and quantitative research components: **you will provide consumer insights by (1) gathering secondary data, (2) conducting primary/qualitative research (focus groups or in-depth interviews), and (3) conducting primary/quantitative research (survey and experiment).** Because the research project will involve a considerable amount of time and effort throughout the quarter, it is vitally important that you work on a project that you find interesting. You are expected to meet outside the class throughout the quarter with your group with the purpose of designing, conducting and reporting on an original research project. I recommend that teams use Zoom to meet virtually outside of class. Teams can also use Zoom to conduct their focus groups or in-depth interviews. **MKTG560 projects successfully completed on behalf of external clients (those outside the University) qualify as one of the “practical experience activities” required for graduation.**

For this project, your team will act in the role of a research supplier working for a client. Your team has two options when selecting a client:

Option 1: Work directly with a local company. For this first option, you would work directly with a profit or non-profit organizations here on campus, in Seattle or the surrounding areas. There must be an actual person or persons acting as your client(s) with whom you negotiate the details of the research. For this option, you would **interview the client** in order to identify the research problem and objectives.

Option 2: Work indirectly with a company by identifying a current research problem. For this second option, you would work on a research problem facing a profit or non-profit organization that your team has identified but are unable to work with directly. For this option, instead of interviewing the client (as you would with option 1), you would **gather additional secondary research** in order to identify the management problem(s) and research problem(s). Note that this does not qualify as a practical experience activity.

In working on the project, you will complete all aspects of the research process we discuss in class. Specifically, you will gather secondary research, conduct your own primary research (both qualitative and quantitative), including sampling, questionnaire development, data collection, data analysis, and finish with a written report and presentation that provides the consumer

insights gained from your research and your strategic recommendations based upon this research.

There are three deliverables, the first two of which serve as an opportunity for you to receive feedback and revise your research before completing your final report.

<u>Deliverable</u>	<u>Due Date</u>	
1. Proposed project	April 9	
2. Quantitative research proposal	April 28	(10% of final grade)
3. Final research presentation and written report	May 26 and June 7	(25% of final grade)

**The first deliverable must be submitted and approved by the professor before you proceed.** It contains the management problem(s), research problem(s) that you'll be researching, why it is important (e.g., how it will be used to make managerial decisions; choose between decision alternatives), and who you plan to sample. The second deliverable includes your **completed** secondary research, your **completed** primary/qualitative research (focus groups or in-depth interviews), and your **proposed** primary/quantitative research. **You should not collect primary/quantitative research (survey and experiment) until you have received feedback on your proposal from the professor.** The final deliverable will include all your research findings (secondary, primary/qualitative, and primary/quantitative). The specific requirements for each deliverable will be discussed in class and posted on Canvas.

### C. Case Analyses (20%)

In addition to the in-class cases (which count as part of your class participation grade), there are four cases to discuss that require greater preparation and thought prior to class discussion. These case analyses are designed for you to apply the readings to solve specific marketing questions and, through our class discussion, check for understanding and identify areas for improvement.

You will be responsible for submitting a case analysis for 2 of the 4 cases (each worth 10%). Specifically, you will be assigned to submit your case analysis and present your analysis to the class for **1 of the first 3 cases**. In addition, **everyone will submit a case analysis for the last case** ("Finale—Just Desserts"). For both, cases must be completed individually using the Catalyst link provided on Canvas and **are only accepted when submitted to Catalyst before class begins on the day that they are due**. Case readings are available in the course pack and/or on Canvas. Assignment questions and details are provided on Canvas and/or Catalyst.

### D. Class Participation and Professionalism (20%)

There are several "in-class" assignments (worth 5% of your total grade). These assignments will be graded as complete/incomplete, with credit given to successfully completed assignments that are submitted on time.

The remainder of your class participation score (15% of your total grade) is based on your participation and professional conduct during class and within your group. A substantial part of the benefit that you will derive from this course is a function of your willingness to expose your viewpoints and conclusions to the critical judgment of the class, as well as your ability to build upon and critically evaluate the judgments of your classmates. Participation in class discussion is

extremely important and each student is expected to contribute. Please feel free to ask questions and to voice your ideas and opinions. In general, you should view preparing cases and exercises as an opportunity to practice using the concepts and tools you will be exposed to during this course. I expect each class member to be prepared at all times to comment in any class session. To reinforce this expectation, I will “warm call” and “cold call” throughout the ensuing discussion (whether or not your hand is raised). An example of a “warm call” is when I send questions to you (or the entire class) before class that I’ll expect you to answer during class. Or I might ask you to adopt certain roles/perspectives that I’d like you to take when answering a question during class.

Grading class participation is necessarily subjective. Some of the criteria that I use for evaluating effective class participation include:

1. Is the participant prepared? Do comments show evidence of analysis of the readings and Panopto recordings? Do comments add to our understanding of the situation? Does the student go beyond simple repetition of facts without analysis and conclusions? Do comments show an understanding of theories, concepts, and analytical devices presented in class lectures/recordings or reading materials?
2. Is the participant a good listener? Are the points made relevant to the current discussion? Are they linked to the comments of others? Is the participant willing to interact with other class members?
3. Is the participant an effective communicator? Are concepts presented in a concise and convincing fashion?
4. Is the participant a professional, respectful, and positive contributor to the classroom learning environment (see classroom etiquette and code of conduct sections below)?

Keep in mind that your grade for class participation is not simply a function of the amount of "air time" you take up. In general, I will evaluate how well you respond to questions and on how effectively you consider the comments and analyses of your classmates. To obtain a grade for class participation you must attend the class sessions, especially those involving case discussions (please let me know in advance if you cannot attend a session). Although I take careful notes after each class regarding each student’s participation that day, I’ll ask weekly for your class participation self-evaluation. The link to these evaluations will be provided in class.

You may supplement your participation grade by submitting research examples (e.g., news articles, questionnaires, links to videos or podcasts) along with your own analysis (e.g., how it relates to a research topic covered in class or the readings). To receive credit, you must submit the example (or link in the case of videos or podcasts) along with a typed critical analysis of the example. **Submissions can be made any time prior to the last day of class (June 2).** As with grading in-class participation, quality matters more than quantity.

As mentioned earlier, your participation grade will also be based upon your contributions to the group’s research project. Peer evaluations are the basis for this and must be **submitted individually no later than June 7.**

### **Classroom Etiquette**

Because I want to encourage your active involvement in this course, I subscribe to the School's policy that expects you will not use technology for non-classroom purposes (e.g., to access email, surf the Internet, or instant message others during class). It is also expected that you will have **your camera on during the duration of the class and your microphone muted when not speaking** as well as will avoid disruptive behavior during class (e.g., talking to roommates during class, arriving late or leaving early). Such behavior will have a negative impact on your participation grade.

### **Academic Honesty**

Everything that you submit is assumed to be your own, original work—work that has been done solely for the purposes of this class. Proper references are required whenever the ideas of another are used in your submissions (i.e., ideas of anyone other than the author(s) of the submitted work regardless of whether this person is a roommate and/or a published author). This includes citing the authors of the textbook whenever referring to concepts or examples from the book.

Moreover, by submitting an exam or case assignment, you are pledging that you have neither given nor received from other students specific information about the exam or case assignment (e.g., answers, information about the difficulty of the exam, or hints about the questions asked). Suspected violations will be handled in compliance with the University of Washington Student Conduct Code (<http://www.washington.edu/admin/rules/policies/WAC/478-120TOC.html>).

### **MBA Honor Code**

I employ the policies and procedures espoused by the Foster School of Business Honor Code to maintain academic integrity in the course.

### **Religious Accommodations**

Washington state law requires that UW develop a policy for accommodation of student absences or significant hardship due to reasons of faith or conscience, or for organized religious activities. The UW's policy, including more information about how to request an accommodation, is available at Religious Accommodations Policy (<https://registrar.washington.edu/staffandfaculty/religious-accommodations-policy/>). Accommodations must be requested within the first two weeks of this course using the Religious Accommodations Request form (<https://registrar.washington.edu/students/religious-accommodations-request/>).

## MKTG560 Spring 2021 Tentative Course Outline

To accomplish the objectives set forth, it is crucial that you read and be prepared to discuss the assigned readings and Panopto recordings before each class. Below is a tentative course outline. You are responsible for any change to the schedule that is announced during class and/or on Canvas. In addition, you should regularly check the “Modules” section of Canvas for class preparation guidelines (including videos) and study guides that are posted for each session.

Date	Topics, Readings, Cases and Assignments
March 29 (M)	<p><u>Introduction to the Class</u></p> <ul style="list-style-type: none"> <li>• Ch. 1: pp. 1-4 (Handbook vol.1)</li> </ul> <p>Project: Select teams, define roles, begin thinking about client</p>
March 31 (W)	<p><u>Introduction to the Research Process</u></p> <ul style="list-style-type: none"> <li>• Ch. 1: pp. 5-12 (Handbook vol.1)</li> <li>• MRA Code of Marketing Research Standards: pp. 2-5, 7-8 (Canvas)</li> <li>• <u>In-Class Case</u>: Standard Grooming Products (Canvas)</li> </ul>
<b>Step 1: Identify Problems and Knowledge Gaps</b>	
April 5 (M)	<p><u>Problem Formulation and Secondary vs. Primary Data</u></p> <ul style="list-style-type: none"> <li>• Ch. 2: p. 15 (Handbook vol. 1)</li> <li>• Ch. 3: pp. 29-36 (Handbook vol. 1)</li> <li>• “Backward Market Research” (CP)</li> <li>• <u>In-Class Case</u>: Isernio’s (Canvas)</li> </ul>
April 7 (W)	<p><u>Collecting Secondary Data</u></p> <ul style="list-style-type: none"> <li>• Create a SimplyAnalytics account at <a href="http://guides.lib.washington.edu/business">http://guides.lib.washington.edu/business</a></li> <li>• <u>“In-class”/asynchronous secondary data assignment</u> (Canvas)</li> </ul> <p>Project: Identify client. Define management and research problems/questions. Get approval from professor for research project concept by submitting it via Canvas by <b>April 9</b>. After approved, gather secondary data to aid project.</p>
<b>Step 2: Measure Qualitatively and Quantitatively</b>	
<b>April 12 (M)</b>	<p><u>Collecting Primary Data Through Communication and Observation</u></p> <p><b><u>Case Analysis #1: The Coop</u></b> -- Write-up due only for those assigned this case</p> <ul style="list-style-type: none"> <li>• The Coop (CP)</li> <li>• Ch. 4: pp. 39-49 (Handbook vol.1)</li> <li>• Ch. 6: pp. 85-88 (Handbook vol.1)</li> <li>• Appendix 1: pp. 157-159 (Handbook vol.3)</li> </ul>
April 14 (W)	<p><u>Qualitative Research Methods</u></p> <ul style="list-style-type: none"> <li>• Ch. 6: pp. 75-81 (Handbook vol.1)</li> <li>• Planning for Focus Groups/IDIs (Canvas)</li> <li>• Premium Salad Dressing video (Canvas)</li> <li>• <u>In-Class Case</u>: Lincoln vs. BMW (see also <a href="https://voyant-tools.org">https://voyant-tools.org</a>)</li> </ul> <p>Project: Finalize moderator guide and begin collecting qualitative data.</p>

April 19 (M)

Quantitative Research Methods

- Ch. 2: pp. 16-18 (Handbook vol.1)
- Ch. 8: pp. 109-111, 114-115 (Handbook vol.1)
- “A Refresher on A/B Testing”: pp. 2-4 (CP)
- In-Class Case: AFC Sushi (Canvas)

**April 21 (W)**

Measurement and Scales

**Case Analysis #2: Boston Fights Drugs** -- Write-up due only for those assigned this case

- Boston Fights Drugs (CP)
- Ch. 4: pp. 54-57, 83-85, 87-88, 91 (Handbook vol.2)
- Ch. 1: pp. 8-9, 12-15 (Handbook vol.3)
- “A Handy Statistical Reference” (Canvas)

Project: Use the results of the qualitative data to develop your hypotheses and draft your questionnaire

April 26 (M)

Questionnaire Design

- Ch. 2: pp. 16-20 (Handbook vol.2)
- Ch. 5: pp. 94, 106-108 (Handbook vol.2)
- “Questionnaire Design and Development”: pp. 2, 5, 10-11 (CP)
- In-Class Cases: Salty’s and bareMinerals (Canvas)

*Recommended: Questionnaire design checklist, Worksheet for Preparing a Relevant Questionnaire BFD example, and Dummy Table Supplement (Canvas)*

Project: Refine your questionnaire

**April 28 (W)**

Questionnaire Design (cont.) and Qualtrics Introduction

**Due for All Teams by April 30: Quantitative research proposal (with secondary research, qualitative research, and proposed questionnaire)**

- Ch. 1: pp. 10-14 (Handbook vol.2)
- Ch. 3: pp. 28-37 (Handbook vol.2)
- “How To: A Guide to Using Qualtrics” (Canvas)
- Visit <https://washington.qualtrics.com> to confirm account
- In-class/asynchronous Qualtrics assignment (Canvas)

May 3 (M)

Sampling Procedures

- Ch. 2: pp. 20-23 (Handbook vol.1)
- Ch. 7: pp. 91-102 (Handbook vol.1)
- In-Class Case: “Understanding Political Polls” (p. 1 in CP)

Project: Outline sampling plan

**May 5 (W)**

Sample Size and Confidence Intervals

**Case Analysis #3: Who’s #1? (Case A)** -- Write-up due only for those assigned this case

- Who’s #1? (CP)
- Ch. 7: pp. 103-107 (Handbook vol.1)

**May 10 (M)**

**EXAM**

---

---

### Step 3: Analyze Data Descriptively and Statistically

---

May 12 (W)      Confidence Intervals and Hypothesis Testing

- Ch. 2: pp. 26-27, 30, 32-33 (Handbook vol.3)
- Ch. 3: pp. 38-43 (Handbook vol.3)
- In-Class Case (cont.): “Understanding Political Polls” (pp. 1-2 in CP)

*Recommended: Handbook of Excel Functions for Descriptive Statistics (Canvas)*

Project: Pretest and revise questionnaire, then collect data.

**May 17 (M)**      Data Preparation/Cleaning  
**Case Analysis #4: Finale – Just Desserts. Write-up due for everyone**

- Finale – Just Desserts (CP and Canvas)
- Ch 2: pp. 22-25 (Handbook vol.3)

---

### Step 4: Present Oral and Written Report

---

May 19 (W)      The Research Report: Strategic Recommendations and Limitations  
Guest speaker: Lui Tong, Director, Direct to Consumer, Swire Coca-Cola HK

- “Questionnaire Design and Development”: pp. 2-4 (CP)

Project: Download data and begin data cleaning and analysis.

May 24 (M)      The Research Report (cont.)  
Guest speaker: Bertha Lee, Associate Director, Analytics & Strategy, IW Group  
*Recommended: Ch 8 (Handbook vol.3) -- recommended reading as you develop your presentation and written report.*

**May 26 (W)**      Group Project Presentations  
**Due for All Teams: Project presentation (team online submission).** PowerPoint presentation must be uploaded to Canvas no later than 30 minutes prior to start of class.

May 31 (M)      UW HOLIDAY

June 2 (W)      Group Project Presentations (cont.) and Course Wrap-Up

**June 7 (M)**      **Due for Everyone: Written report (team online submission) and peer evaluation**  
**@ 2:30 PM**      **(individual online submission)**

---