

### COURSE INFORMATION

Course title:	Data Driven Marketing	Credits:	1.5
Course code:	BAMA 517	Class location:	Zoom
Session, term, period:	2020W2, Period 3	Class times:	T/Th, 4pm -6pm
Section(s):	BA1	Pre-requisites:	BAMA 509
Course duration:	Mar 8 – Apr 9, 2021	Co-requisites:	n/a
Division:	Marketing		
Program:	MBAN		

### INSTRUCTOR INFORMATION

Instructor:	Yi Qian, Associate Professor of Marketing and Behavioral Sciences		
Phone:	604-827-5154	Office location:	HA 567
Email:	<a href="mailto:yi.qian@sauder.ubc.ca">yi.qian@sauder.ubc.ca</a>	Office hours:	Tues 2:30-3:30pm

Teaching assistants:	Xixi Hu		
Office hours:	TBA	Tutorial Sessions:	TBA
Email:	Hu, Xixi <xixi.hu@sauder.ubc.ca>		

### COURSE DESCRIPTION

Marketing expenditure often constitutes a significant proportion of a firm's operation cost. Therefore, optimizing the return on investment from marketing is essential to the firms' profitability or even survival. Traditionally, the marketers have long been constrained by lacking in-depth data and tools to accurately target and effectively communicate with consumers. Today, people's enriched digital lifestyles provide a tremendous amount of data in a wide range, not to mention the advancement in computational tools and capacities which also lends strong hands in recording and decoding the consumer behavior. We will discuss how these new developments help better reply the "old" questions of marketers: who are the consumers, why they want/don't want the product, where we can find them, and how can we persuade them etc.

This course will cover the new analytical tools emerged in the frontier of marketing, as well as the traditional methods for exploring and analyzing consumer insights. This course will provide students with the analytical mindset as well as tools that can look through the data and gain an in-depth understanding of the consumer and the market.

### COURSE FORMAT

In terms of learning method, this course will provide a blend of lectures, case studies, hands-on exercises, and methodological discussions. Practices of analysis using R software will be included. Students are highly encouraged to actively participate in class discussions. After-class tutorials or labs can be made available.

### LEARNING OBJECTIVES

By the end of this course, students will be able to:

1. Gain an understanding of the data collection and analysis methods used by marketing professionals
2. Learn to develop consumer insights from interpreting marketing data

3. Choose appropriate analytics tools and techniques to evaluate the marketing content and channels
4. Creatively develop and analytically critique marketing strategies, marketing research designs, and the statistical methods used to provide marketing intelligence.
5. Understand the framework of marketing research with data support
6. Collect marketing data and obtain the major marketing metrics in real business environment
7. Analyze business problems using statistically-based thinking.
8. Quantify the magnitude and elasticity of different marketing mix.

## ASSESSMENTS

### Summary

<u>Component</u>	<u>Weight</u>
Assignments	45%
Peer Evaluations	10%
Group project	30%
Class participation/Commitment	15%
Total	<u>100%</u>

### Details of Assessments

#### Assignments

During the term, there will be several individual or group assignments. Some of these will be completed in class, and others will require homework. Each assignment will focus on a different stage of the research process. The assignments will improve your research skills and prepare you for the final exam. The penalty for late assignment will be proportional to the time of being late for. Please see more details on the assignment due dates and penalty at the end of this document.

Group assignments must be prepared individually for each group. Sharing work across groups is strictly prohibited in line with the RHL Academic Misconduct Regulations. Each self-enrolled group has 5-6 team members. You will stay in the same team for all the group assignments. Peer evaluations will be conducted at the end of semester.

#### Peer Evaluations

Peer evaluations will be completed at the end of the semester to provide feedback on how team members think each member (including their own) is contributing to the team's assignments. Individual grades on group assignment may be subject to adjustment following my review of peer evaluations. Reductions can be significant, ranging from a decrease of 10% to a decrease of 100% if an individual has contributed little or nothing to the team's work. In most instances, where team members are reliable and contribute, no adjustments are made.

Students are required to complete both of these peer evaluations by the specified deadlines. Failure to complete the evaluation will result in a 10% reduction in the final mark received for this course. Please ensure that you complete the peer evaluations on time.

### **Class Participation/Commitment**

We all bring experience and knowledge into the classroom, and I expect all class participants to share this and benefit by it. For effective class participation you need to have read the assigned materials.

Effective class participation includes

1. -asking questions about concepts from lectures or readings that you agree or disagree with;
2. -sharing your experience or point of view with the class
3. -building on points raised by others;
4. -clarifying issues or
5. -relating topics discussed to previous class discussions.

Direct student-student interaction is encouraged. Such interaction should be both positive and courteous even when your opinions differ. Class attendance is important. Regular and punctual attendance is a necessary but not a sufficient criterion for high class participation grades. You should submit a printout that includes a passport size photo, your name, e-mail address and a contact phone number. You should also include a short statement that describes any marketing experience you have had and what your future plans and goals are. I will use this roster to keep track of your class participation grade.

Rather than merely rehashing concepts from the textbook, class sessions will be devoted to extending and applying concepts. I will assume that all of you have completed the reading prior to class so that we can spend time on class exercises that simulate real world problems. Be prepared to discuss and present the assigned readings and/or problems. Your learning will be substantially enhanced if you come to class well prepared. If you are unable to attend class, you are responsible for catching up on the material covered or announcements made in class with your group-mate(s).

Positive contributions to class discussion increase your score. Attending class and not speaking has neither a positive nor a negative impact on your participation grade. Further, you can demonstrate your class commitment by diligently following course instructions, emailing me any marketing research examples from the media and/or your own industry experience, which you feel may enhance the class discussion. Failing to attend significant portions of a class session, poor preparation, and detrimental participation (including being disrespectful to any class member) decrease your participation score.

### **Group Project**

In this course, you will be given a standard client and case background to do your group project on. In the end, you will have an opportunity to summarize the key learnings from the process of doing the project, the limitations of the research and future directions. Group assignments (different components of the project as outlined in the schedule at the end of this document) must be prepared individually for each group. Please bring your preparatory work to group meetings and this would make the group discussions most efficient. Sharing work across groups is strictly prohibited in line with the Academic Misconduct Regulations. Each self-enrolled group has 5-6 team members. You will stay in the same team for all the graded group assignments. Peer evaluations will be conducted at the end of term.

### **Re-grading:**

Re-grade requests on any components of your course grade must be submitted within 10 days from when the assignment (i.e., homework and the final exam) is returned. Along with the graded assignment, you must attach a letter explaining why you are requesting a re-grade. While I will consider the specific concerns cited in your letter, I will re-grade the entire assignment. Your grade may go up or

down and the new grade is final. Please remember that small changes in your grade on a single assignment typically do not affect your overall course grade.

### LEARNING MATERIALS

Required: The background readings, cases, or articles will be assigned for most classes. They will be available on Canvas or through library links.

Estimated cost of required materials: \$0-10

### Data analysis software

R, and Rstudio (Free downloads)

Additional materials recommended but not required: Feinberg F., T. Kinnear, and J. Taylor, Modern Marketing Research: Concepts, Methods and Cases, 2<sup>nd</sup> edition, Cengage Learning.

The text provides a more detailed description of Marketing Research and contains examples and applications. I have provided the David Lam library with my copy of the 1<sup>st</sup> version on their reserves shelf for students to use. I also requested that they order the 2<sup>nd</sup> edition to keep on reserve. You are also welcome to share a book within your self-designated group (usually of size 5 or 6). There are Amazon copies, and the online eBook version is linked below where you could select the 'eBook' product for checkout: <https://books.google.ca/books?id=RBxuCgAAQBAJ>

Because our DL library is closed for the COVID, I have been communicating with the librarians and relevant parties for seeking the best solution for making the textbook that I placed on reserve available. We are waiting for the copyright clearance to our best ability.

FYI, the first two chapters can be viewed on google books:

[https://play.google.com/books/reader?id=RBxuCgAAQBAJ&printsec=frontcover&source=gbs\\_atb\\_hover&pg=GBS.PA97.w.21.0.21](https://play.google.com/books/reader?id=RBxuCgAAQBAJ&printsec=frontcover&source=gbs_atb_hover&pg=GBS.PA97.w.21.0.21)

### COURSE-SPECIFIC POLICIES AND RESOURCES

#### *Missed or late assignments, and regrading of assessments*

All group or individual assignments must be submitted before 11:59pm on the due day listed in the schedule. Late submissions will be penalized for a deduction of 10% of the score for every day of lateness.

#### *Academic Concessions*

If extenuating circumstances arise, please contact the RHL Graduate School program office as early as reasonably possible, and submit an [Academic Concession Request & Declaration Form](https://webforms.sauder.ubc.ca/academic-concession-rhlee) <https://webforms.sauder.ubc.ca/academic-concession-rhlee>. If an academic concession is granted during the course, the student will be provided options by RHL, or by the instructor in consultation with RHL, per [UBC's policy on Academic Concession](#).

#### *Other Course Policies and Resources*

The first class attendance is mandatory for the registration of this course.

### *Code Plagiarism*

Code plagiarism falls under the UBC policy for [Academic Misconduct](#). Students must correctly cite any code that has been authored by someone else or by the student themselves for other assignments. Cases of "reuse" may include, but are not limited to:

- the reproduction (copying and pasting) of code with none or minimal reformatting (e.g., changing the name of the variables)
- the translation of an algorithm or a script from a language to another
- the generation of code by automatic code-generations software

An "adequate acknowledgement" requires a detailed identification of the (parts of the) code reused and a full citation of the original source code that has been reused.

Students are responsible for ensuring that any work submitted does not constitute plagiarism. Students who are in any doubt as to what constitutes plagiarism should consult their instructor before handing in any assignments.

## **POLICIES APPLICABLE TO COURSES IN THE ROBERT H. LEE GRADUATE SCHOOL**

### *Attendance*

Excepting extenuating circumstances, students are expected to attend 100% of their scheduled class hours. Absent students limit their own academic potential, and that of their classmates, and cause unnecessary disruption to the learning environment. Students missing more than 20% of the total scheduled class hours for a course (including classes held during the add/drop period) without having received an academic concession will be withdrawn from that course. Withdrawals, depending on timing, could result in a "W" or an "F" standing on the transcript.

### *Punctuality*

Students are expected to arrive for classes and activities on time and fully prepared to engage. Late arrivals may be refused entry at the discretion of the instructor or activity lead. Students arriving later than halfway through a scheduled class will be treated as absent for that class.

### *Electronic Devices*

During online lectures, students are not permitted to use any electronic devices other than the primary one used for attending the online lecture (e.g. laptop or desktop). Only Zoom should be open during the online lecture unless an instructor advises the use of another program/website for an in-class activity. Feedback from students indicates that personal devices are the number one distraction from effective learning and participation in the online learning environment.

### *Citation Style*

Please use the American Psychological Association (APA) reference style to cite your sources.

Details of the above policies and other RHL Policies are available at:

<http://www.calendar.ubc.ca/vancouver/index.cfm?tree=12,199,506,1625>

## **UNIVERSITY POLICIES AND RESOURCES**

UBC provides resources to support student learning and to maintain healthy lifestyles but recognizes that sometimes crises arise and so there are additional resources to access including those for survivors of sexual violence. UBC values respect for the person and ideas of all members of the academic

community. Harassment and discrimination are not tolerated nor is suppression of academic freedom. UBC provides appropriate accommodation for students with disabilities and for religious observances. UBC values academic honesty and students are expected to acknowledge the ideas generated by others and to uphold the highest academic standards in all of their actions. Details of the policies and how to access support are available on the UBC Senate website at <https://senate.ubc.ca/policies-resources-support-student-success>.

### *Respect for Equity, Diversity, and Inclusion*

The UBC Sauder School of Business strives to promote an intellectual community that is enhanced by diversity along various dimensions including status as a First Nation, Metis, Inuit, or Indigenous person, race, ethnicity, gender identity, sexual orientation, religion, political beliefs, social class, and/or disability. It is critical that students from diverse backgrounds and perspectives be valued in and well-served by their courses. Furthermore, the diversity that students bring to the classroom should be viewed as a resource, benefit, and source of strength for your learning experience. It is expected that all students and members of our community conduct themselves with empathy and respect for others.

### *Academic Integrity*

The academic enterprise is founded on honesty, civility, and integrity. As members of this enterprise, all students are expected to know, understand, and follow the codes of conduct regarding academic integrity. At the most basic level, this means submitting only original work done by you and acknowledging all sources of information or ideas and attributing them to others as required. This also means you should not cheat, copy, or mislead others about what is your work. Violations of academic integrity (i.e., misconduct) lead to the breakdown of the academic enterprise, and therefore serious consequences arise and harsh sanctions are imposed. For example, incidences of plagiarism or cheating may result in a mark of zero on the assignment or exam and more serious consequences may apply if the matter is referred to the President's Advisory Committee on Student Discipline. Careful records are kept in order to monitor and prevent recurrences.

### *Academic Freedom and Students Studying from Outside Canada*

During this pandemic, the shift to online learning has greatly altered teaching and studying at UBC, including changes to health and safety considerations. Keep in mind that some UBC courses might cover topics that are censored or considered illegal by non-Canadian governments. This may include, but is not limited to, human rights, representative government, defamation, obscenity, gender or sexuality, and historical or current geopolitical controversies. If you are a student living abroad, you will be subject to the laws of your local jurisdiction, and your local authorities might limit your access to course material or take punitive action against you. UBC is strongly committed to academic freedom, but has no control over foreign authorities (please visit <http://www.calendar.ubc.ca/vancouver/index.cfm?tree=3,33,86,0> for an articulation of the values of the University conveyed in the Senate Statement on Academic Freedom). Thus, we recognize that students will have legitimate reason to exercise caution in studying certain subjects. If you have concerns regarding your personal situation, consider postponing taking a course with manifest risks, until you are back on campus or reach out to your academic advisor to find substitute courses. For further information and support, please visit: <http://academic.ubc.ca/support-resources/freedom-expression>

**COPYRIGHT**

All materials of this course (course handouts, lecture slides, assessments, course readings, etc.) are the intellectual property of the instructor or licensed to be used in this course by the copyright owner. Redistribution of these materials by any means without permission of the copyright holder(s) constitutes a breach of copyright and may lead to academic discipline and could be subject to legal action. Any lecture recordings are for the sole use of the instructor and students enrolled in the class. In no case may the lecture recording or part of the recording be used by students for any other purpose, either personal or commercial. Further, audio or video recording of classes are not permitted without the prior consent of the instructor. Students may not share class Zoom links or invite others who are not registered to view sessions.

**ACKNOWLEDGEMENT**

UBC’s Point Grey Campus is located on the traditional, ancestral, and unceded territory of the xʷməθkʷəy̓əm (Musqueam) people, who for millennia have passed on their culture, history, and traditions from one generation to the next on this site.

**ONLINE TEACHING TOOL & REQUIREMENTS**

This course will be taught using Zoom for synchronous classes and office hours.

*[if you wish to take attendance, tack polls, or pre-set breakout groups in your Zoom sessions, include the statement below]*

For this course, you are required to use a Zoom account during synchronous classes and office hours. If you do not have a Zoom account, you can create one here: <https://zoom.us/signup>. Note: creating a Zoom account requires that you provide a first name, last name, and email address to Zoom. For privacy purposes, you may consent to using your existing email address and your real name. Alternatively, if you prefer, you may sign up using an alternative email address and an anonymized name that does not identify you (i.e. Jane Doe, [jane.doe@email.com](mailto:jane.doe@email.com)). If you have trouble creating an account, or accessing a Zoom session, please contact [CLCHelp@sauder.ubc.ca](mailto:CLCHelp@sauder.ubc.ca). You will be required to provide the email address associated with your Zoom account in a Canvas quiz for identification purposes.

To help replicate the classroom experience, make sessions more dynamic and hold each person accountable, both students and instructors are required to have their cameras on during Zoom sessions. Students who require an accommodation with regard to the “camera on” requirement must contact their instructors in advance of the first class to discuss options. As professional graduate students, students are expected to conduct themselves professionally by joining sessions on time, muting mics when not speaking, refraining from using any other technology when in-session, attending in business casual dress (at a minimum), and participating from a quiet environment. Content from synchronous sessions will be selectively recorded per instructor discretion and made available to students on Canvas for a maximum duration of the course length. This is done to allow students the opportunity to return to lecture content to solidify learnings.

**COURSE SCHEDULE**

(Subject to change with class consultation)

Class	Synchronous Or Asynchronous	Date	Topic	Readings or Activities	Assessments due
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1	S	March 9	Introduction to data-driven marketing and Course Framework	Pre-Readings: 1. Chapters 1, 2, 3 (Same across versions) 2. "Backward Market Research" 3. "Cost Conscious Market Research" 4. "When Good Research Goes Bad"	Please fill out the Individual Information survey in the Assignments folder on Canvas with your name and brief background information
2	S	March 11	Marketing Data: Secondary Data Research	Read the first individual assignment	Research Design Exercises on Canvas. Please take the several surveys on the "Assignments" page
3	S	March 16	Research Designs	Pre-Readings: 1. V1: Chapter 6 (p.214-228); V2e: Chapter 5 (p217-234) 2. V1: Chapter 3 (p.62-98); V2e: Chapter 2 (p.57-96) 3. V1: Chapters 5 (p.182-190); V2e: Chapter 4 (p.186-195) 4. P&G Checks out real life (WSJ) 5. Boost your marketing ROI with experimentation	<b>DUE end of the day Individual Assignment 1</b>
4	S	March 18	STP with Crosstabs	Pre-Readings: V1: Chapter 9 (p.392-395, p.426-428); V2e: Chapter 8 (p.390-394, 427-430)  Case: Joyoung Soymilker	Prepare the Joyoung Soymilk Maker case. Refresh your learnings in BAMA 509 Marketing Analytics, and be ready to deepen and build on.
5	A	March 23	STP with Factor and Cluster Analyses	Pre-Readings: V1: Chapter 11 (p.472-491, p.494-510); V2e: Chapter 10 (p.476-498, 501-517) Mini-case: Chewing Gums (in-class)	Review lecture notes from Classes 3-5
6	S	March 25	Lab Session: Factor and Cluster Analyses in R	Pre-Readings: Segmentation of the games market using multivariate analysis	<b>DUE end of the day Individual Assignment 2</b>



				Mini-case: Chewing Gums (in-class) Continued	
7	A	March 30	Marketing Mix Modelling	Pre-Readings: 1. Yoon E. 2012 Sell More with Smarter Trade Promotions. Available: <a href="https://hbr.org/2012/07/build-better-trade-promotions">https://hbr.org/2012/07/build-better-trade-promotions</a> 2. V1: Chapter 8 (p.290-302); V2e: Chapter 7 (p.298-311)	In-class Exercises
8	S	April 1	Positioning with Maps	Pre-Readings: V1: Chapter 11 (510-540); V2e: Chapter 10 (524-555) Mini-case: Repositioning Infinity G-20 (in-class)	<b>DUE Individual Assignment 3</b>
9	S	April 6	Product designs with Conjoint Analysis: an overview Course wrap-up	Pre-Readings: V1: Chapter 11 (p.510-528); V2e: Chapter 11 (p.524-543) V1: Chapter 12.4 (pp.591-597); V2e: Chapter 12 (p.594-603)	Review all lecture notes
10	S	April 8	Onto the Real World	Guest lecture on real-world applications	<b>Due end of the day Group Assignment 4</b>
-				Group Project Due	Scheduled by RHL Office.