

## **USF BUS 363: Consumer Behavior**

<b>Course</b>	<b>Marketing Analytics</b> Course contents © Stephan Sorger University of San Francisco BUS 363; 2017 Spring
<b>Professor</b>	Stephan Sorger Phone: 650.455.4411 email: <a href="mailto:sgsorger@usfca.edu">sgsorger@usfca.edu</a> ; <a href="http://www.StephanSorger.com">www.StephanSorger.com</a>
<b>Meetings</b>	Dates: Tuesdays, 6:30 – 10:10PM; Malloy Hall MH LL6, San Francisco January 24 – May 16, 2017

### **Course Description**

This course offers a balanced coverage of consumer behavior, including psychological, social and managerial implications. Through projects based on in-store studies, as well as observational and experimental research, students gain essential tools to better understand consumer behavior. Specifically, the course rests on three foundations: (1) applying consumer behavior concepts in real life situations, (2) understanding and applying existing theory and data relevant to consumer behavior from psychology, economics and other social sciences, and (3) gathering data with important consumer behavior research techniques (for example, use of experimental methods).

### **Course Outcomes**

On successful completion, participants will:

- Understand how to apply consumer behavior concepts to real life situations
- See how to gather data using important consumer behavior research techniques
- Understand how to apply existing theory and data relevant to consumer behavior

### **Prerequisites**

- BUS 302 Marketing Plan
- or BUS 492 Honors Marketing Principles
- Class restricted to Junior and Senior students

### **Biography**

Stephan Sorger, M.S., M.B.A. is an award-winning serial marketing executive, an adjunct faculty member of several major universities, the author of multiple marketing textbooks, a popular speaker on marketing topics, and a member of several advisory boards. Stephan is an expert on marketing analytics, new product development, marketing strategy and planning. He is the author of the Pearson Prentice-Hall textbook, "Marketing Planning: Where Strategy Meets Action," as well as the ground-breaking book on analytics, "Marketing Analytics: Strategic Models and Metrics."

### **Office Hours**

Students are encouraged to meet during office hours to discuss questions about the course or to obtain general information, such as career advice in the field of marketing. No meetings on holiday weekends.

- Tuesday evenings: After class
- Saturday afternoons: 12PM-1PM at UC Berkeley Ext. Campus, 160 Spear Street, San Francisco, by appt.

### **Required Textbooks:**

Solomon, Michael. "Consumer Behavior: Buying, Having, and Being". 12<sup>th</sup> Edition. 2017.

ISBN 978-0134129938

Ariely, Dan. "Predictably Irrational." Any edition acceptable.

For reference, the 2010 Harper Perennial 2010 edition: ISBN 978-0061353246

### **Resources**

- **Course Website:** Go to [StephanSorger.com](http://StephanSorger.com) and click on the "Consumer Behavior" course link to access online materials for the course. See professor for password. Some content will be added as course progresses.
- **Canvas:** Exams and assignments will be administered through the Canvas university online learning system.

## **Grading and Course Components**

Grading is calculated from the components shown below, using standard grading cutoff points:

100 – 94 = A, 93 – 90 = A-, 89 – 87 = B+, 86 – 84 = B, 83 – 75 = B-, 74 – 65 = C. No extra credit permitted.

	<u>Percent</u>
Project	25%
Midterm Exam	25%
Final Exam	25%
Assignments (3 * 5 points each)	15%
Class Participation	<u>10%</u>
Total	100%

### **Project**

Students shall gain practice in applying consumer behavior principles by preparing a consumer behavior presentation. Students shall work in groups of 5 – 9 people and will present their plan during the final days of the course. Each student in a group shall receive the same grade as their other group members. Each student in a group must submit an individual copy of the project online through the Canvas learning platform in Microsoft PowerPoint (ppt) or Adobe Portable Document Format (pdf) formats. Late projects or projects not in the approved formats will not be accepted. No written report is required.

Students may select the brand or company of their choice. Select a brand with a physical presence at a local retail environment so that the group can execute onsite ethnographic research. All information must be non-confidential. Students must create their own original work and not re-purpose any existing reports or analyses.

Grading shall be accomplished in real time during the presentation of the project, in accordance with the Project Grading Criteria and Grading Guidelines specified below. Each content section shall include at least one slide, clearly labeled with the title given in the grading criteria. Each section will be graded between 1 (poor) and 5 (outstanding) for each of the 20 criteria, for a total of 100% of the score for the project.

After the end of all presentations, the professor will deliver feedback to the student groups. Feedback will consist of the final scores as well as comments for each of the graded sections, as applicable.

<u>Project Grading Criteria</u>	<u>Score</u>
1. Deliverable Hardcopy, printed 2 slides per page delivered before start of all presentations	1 2 3 4 5
2. Presentation Time Presentation delivered in 15 minutes, including setup time	1 2 3 4 5
3. Presentation Clarity: Verbal Presenters easy to understand, with good presentation flow. Shows substantial rehearsal.	1 2 3 4 5
4. Presentation Clarity: Visual Slides clear. Few text-only slides. No typographical errors. Clear charts, tables, and graphs.	1 2 3 4 5
5. Title slide Title slide includes name of brand and names of all team members	1 2 3 4 5
6. Objective: The objective, or goal, of the company or brand. What are they trying to achieve? Cite source.	1 2 3 4 5
7. Mission Statement: The statement(s) that describe your “mission.” What values or principles guide them? Cite source.	1 2 3 4 5
8. Competitive Advantage: The unique competitive differentiators. What makes them special? Cite source.	1 2 3 4 5
9. Market Overview: A description of the consumer base targeted. What do they want? What needs are they trying to satisfy?	1 2 3 4 5
10. Market Trends An analysis of the trends and potential opportunities and threats. How are consumers changing?	1 2 3 4 5
11. Market Segments: Subsets within the market. How do the needs differ in each segment?	1 2 3 4 5
12. Competition: Alternatives facing consumers. How do consumers perceive the different brands?	1 2 3 4 5
13. Strategy: Method for executing the objective. How does the brand fulfill consumer needs?	1 2 3 4 5
14. Product/Service Tactics: What offering does the brand provide? How do they describe it? How is it relevant to consumers? Include descriptive elements such as value proposition, messaging, and differentiation.	1 2 3 4 5
15. Pricing Tactics: Setting price based on perceived value. How does price address issues discussed by Dan Ariely?	1 2 3 4 5

16. Distribution:	1 2 3 4 5
Distribution channels used to deliver the product. How do the channels address consumer needs?	
17. Promotion:	1 2 3 4 5
Vehicles to communicate to customers. How well do the communications persuade consumers to buy?	
18. Relationship:	1 2 3 4 5
Long term role of brand in the life of consumer.	
19. Conclusion	1 2 3 4 5
Assessments on the project. What lessons did you learn?	
20. Recommendations	1 2 3 4 5
Specific actions the brand should execute to increase revenue. Consider situation, achievability and resources.	

### Midterm Exam

Students will take a midterm exam on the scheduled date, using the online Canvas system. The exam will cover the material shown in the schedule. Students are not allowed to collaborate with other students or access information sources, such as the textbook, notes, or the Internet. If the student cannot attend the exam on the scheduled date, they must make arrangements ahead of time to take it at a different date.

### Final Exam

Students will take a final exam on the scheduled date, using the online Canvas system. The exam will be cumulative, covering potentially all the material presented in the course. Students are not allowed to collaborate with other students or access information sources, such as the textbook, notes, or the Internet. If the student cannot attend the final exam on the scheduled date, they must make arrangements ahead of time to take it at an earlier date.

### Assignments

The class will include three take-home assignments. Please access and submit assignments through the Canvas university online learning system in Microsoft Word (doc) or Adobe Portable Document Format (pdf) format. Assignments must be delivered by the due date and in the format specified, or no credit will be given. All exceptions must be cleared by the professor before the due date. Specific grades will be assigned using the Grading Guidelines specified below.

#### Assignment 1: Brand/Topic Selection: 5 points

Submit a one to two page description of the brand or topic selected for your project. Include the following:

- Name of brand or topic
- Names of team members
- Aspect to be studied

#### Assignment 2: Research Plan: 5 points

- Research method; Must include personal visit(s) to retail environment or other ethnographic research
- Research data: Specify the type of data to be collected
- Research tool: Present the questionnaire or other instrument used by the group to collect data

#### Assignment 3: Research Results: 5 points

- Data summary: Summarize the data collected
- Consumer behavior observations: Describe behavior executed by consumers in retail environment
- Affirmations and surprises: State behavior consistent with your beliefs and behavior that you did not expect

### Grading Guidelines

#### "A" Range: Outstanding achievement, significantly exceeds standards

- Unique topic or unique treatment of topic, takes risks with content; fresh approach.
- Sophisticated/exceptional use of examples.
- Original and "fluid" organization; all sentences and paragraphs contribute; sophisticated transitions between paragraphs.
- Integration of quotations and citations is sophisticated and highlights the author's argument.
- Confidence in use of Standard English; language reflects a practiced and/or refined understanding of syntax and usage.
- Sentences vary in structure, very few, if any mechanical errors (no serious mechanical errors).

#### "B" Range: Commendable achievement, meets or exceeds standards for course.

- Specific, original focus, content well handled.
- Significance of content is clearly conveyed; good use of examples; sufficient support exists in key areas.
- Has effective shape (organization), effective pacing between sentences or paragraphs.

- Quotations and citations are integrated into argument to enhance the flow of ideas.
- Has competent transitions between all sentences and paragraphs.
- Conveys a strong understanding of standard English; the writer is clear in his/her attempt to articulate main points, but may demonstrate moments of "flat" or unrefined language.
- May have a few minor mechanical errors (misplaced commas, pronoun disagreement, etc.), but no serious mechanical errors (fragments, run-ons, comma splices, etc.)

**"C" Range: Acceptable achievement, meets standards for course**

- Retains overall focus, generally solid command of subject matter
- Subject matter well explored but may show signs of underachievement
- Significance is understood, competent use of examples
- Structure is solid, but an occasional sentence or paragraph may lack focus
- Quotations and citations are integrated into argument
- Transitions between paragraphs occur but may lack originality
- Competent use of language; sentences are solid but may lack development, refinement, style
- Occasional minor mechanical errors may occur, but do not impede clear understanding of material
- No serious mechanical errors (fragments, run-ons, comma-splices, etc.)

**"D" Range: Unsatisfactory achievement; does not meet acceptable standards**

**Note:** The "D" grade is a passing grade; work that is not of "passing quality" should receive grade "F".

- Significance of content is unclear
- Ideas lack support, elaboration
- Lacks sufficient examples or relevance of examples may be unclear
- Support materials is not clearly incorporated into argument
- Expression is frequently awkward (problematic sentence structure)
- Mechanical errors may often impede clear understanding of material
- May have recurring serious mechanical errors (fragments, run-ons, comma splices, etc.)

**"F" Range: Fails to meet minimal standards**

- Ignores assignment
- Lacks significance
- Lacks coherence
- Includes plagiarized material (intentional or unintentional)
- Lacks focus
- Difficult to follow due to awkward sentence or paragraph development
- Mechanical errors impede understanding
- Problems with writing at the graduate level

**Case Studies**

Students gain expertise in applying consumer behavior principles to real-world conditions by examining case studies. We will cover the case studies at the back of the chapters in the textbook. Students will work in their selected project teams. Each team will give a two minute presentation at the end of the class period summarizing the case and providing recommendations on what the brand/company should do given the situation they face. Student presentations shall be an important factor in determining class participation grades.

**Class Participation**

Class participation is made up of two components, attendance (5 points) and discussions (5 points).

**Attendance:** Students must attend classes to enjoy the full benefits the course offers. To that end, attendance will be monitored every class session, and points deducted for unexcused absences or tardiness more than 10 minutes.

Students could be asked to sign in on an attendance sheet. The scoring is calculated as follows (5 points max)

5 points: Attended all classes punctually

4 points: Missed one class, or was late to one class

3 points: Missed two classes or was late to two classes

0 points: Missed more than two classes or late to more than two classes.

**Discussions:** Students are expected to study the assigned material to prepare for class sessions and ask relevant questions to gain understanding during class. To that end, discussions will be monitored during every class session, and points calculated as follows (5 points max):

5 points: Leads class in discussions. Helps class come to consensus. A leader. Contributes many relevant examples.  
4 points: Regular contributor, with relevant examples that demonstrate understanding.  
3 points: Participates occasionally  
0 points: Does not actively contribute to class  
-5 points: Interrupts other students; Not respectful of others; Discusses irrelevant topics

### **Academic Integrity**

As a Jesuit institution committed to *cura personalis*—the care and education of the whole person—USF has an obligation to embody and foster the values of honesty and integrity. USF upholds the standards of honesty and integrity from all members of the academic community. All students are expected to know and adhere to the University's Honor Code. You can find the full text of the code online at <http://myusf.usfca.edu/academic-integrity>  
The policy covers:

- Plagiarism — intentionally or unintentionally representing the words or ideas of another person as your own; failure to properly cite references; manufacturing references.
- Working with another person when independent work is required.
- Submission of the same paper in more than one course without the specific permission of each instructor.
- Submitting a paper written by another person or obtained from the internet.
- The penalties for violation of the policy may include a failing grade on the assignment, a failing grade in the course, and/or a referral to the Academic Integrity Committee.

### **Student Disability Services**

If you are a student with a disability or disabling condition, or if you think you may have a disability, please contact USF Student Disability Services (SDS) at 415 422-2613 within the first week of class, or immediately upon onset of disability, to speak with a disability specialist. If you are determined eligible for reasonable accommodations, please provide me with your SDS Verified Individualized Services and Accommodations (VISA) form, and we will discuss your needs for this course. For more information, please visit: <http://www.usfca.edu/sds> or call (415) 422-2613.

### **Behavioral Expectations:**

All students are expected to behave in accordance with the Student Conduct Code and other University policies (see <http://myusf.usfca.edu/fogcutter/student-conduct>). Open discussion and disagreement is encouraged when done respectfully and in the spirit of academic discourse. There are also a variety of behaviors that, while not against a specific University policy, may create disruption in this course. Students whose behavior is disruptive or who fail to comply with the instructor may be dismissed from the class for the remainder of the class period and may need to meet with the instructor or Dean prior to returning to the next class period. If necessary, referrals may also be made to the Student Conduct process for violations of the Student Conduct Code.

Please let professor know during first week if any industries or topics are offensive and should not be discussed.

### **Learning & Writing Center**

The Learning & Writing Center provides assistance to all USF students in pursuit of academic success. Peer tutors provide regular review and practice of course materials in the subjects of Math, Science, Business, Economics, Nursing and Languages. Other content areas can be made available by student request. To schedule an appointment, log on to TutorTrac at <https://tutortrac.usfca.edu>. Students may also take advantage of writing support provided by Rhetoric and Language Department instructors and academic study skills support provided by Learning Center professional staff. For more information about these services contact the Learning & Writing Center at (415) 422-6713, email: [lwc@usfca.edu](mailto:lwc@usfca.edu) or stop by our office in Cowell 215. Information can also be found on our website <https://www.usfca.edu/student-life/learning-writing-center>.

### **Counseling and Psychological Services**

Our diverse staff offers brief individual, couple, and group counseling to student members of our community. CAPS services are confidential and free of charge. Call 415-422-6352 for an initial consultation appointment. Having a crisis at 3 AM? We are still here for you. Telephone consultation through CAPS After Hours is available between the hours of 5:00 PM to 8:30 AM; call the above number and press 2.

### **Confidentiality, Mandatory Reporting, and Sexual Assault**

As an instructor, one of my responsibilities is to help create a safe learning environment on our campus. I also have a mandatory reporting responsibility related to my role as a faculty member. I am required to share information regarding sexual misconduct or information about a crime that may have occurred to a USF student with the University. Here are other resources:

- To report any sexual misconduct, students may visit Anna Bartkowski (UC 5th floor) or see many other options by visiting our website: <http://myusf.usfca.edu/student-health-safety/safer>

- Students may speak to someone confidentially, or report a sexual assault confidentially by contacting Counseling and Psychological Services at 415-422-6352.
- To find out more about reporting a sexual assault at USF, visit USFs Callisto website at: [www.usfca.callistocampus.org](http://www.usfca.callistocampus.org)
- For an off-campus resource, contact San Francisco Women Against Rape (SFWAR) (415) 647-7273 ([www.sfwar.org](http://www.sfwar.org)).

**Student Accounts - Last day to withdraw with tuition reversal**

Students who wish to have the tuition charges reversed on their student account should withdraw from the course(s) by the end of the business day on the last day to withdraw with tuition credit (census date) for the applicable course(s) in which the student is enrolled. Please note that the last day to withdraw with tuition credit may vary by course. The last day to withdraw with tuition credit (census date) listed in the Academic Calendar is applicable only to courses that meet for the standard 15-week semester. To find what the last day to withdraw with tuition credit is for a specific course, please visit the Online Class Schedule at [www.usfca.edu/schedules](http://www.usfca.edu/schedules).

## **Schedule**

### **January 24, 2017**

#### **Meeting 1**

- Administration Review syllabus; Introduce class members; Set up teams
- Chapter 1 Buying, Having, and Being
- Video Goodwill Industries: Understanding Consumer Behavior (6:43)
- Assignment 1 Team discussion: Topic selection

### **January 31, 2017**

#### **Meeting 2**

- Chapter 2 Consumer and Social Well-Being
- Video Life is Good: Ethics and Social Responsibility (7:22)
- Case Chapter Case Study: Marketing Responsibly: Panera, Patagonia and P&G (actual case can vary based on availability of textbook)

### **February 7, 2017**

#### **Meeting 3**

- Chapter 3 Perception
- Video Umpqua Bank (4:36)
- Case Chapter Case Study: The Brave New World of Subway Advertising
- Assignment 1 due

### **February 14, 2017**

#### **Meeting 4**

- Chapter 4 Learning and Memory
- Video Plymouth Rock Assurance (3:55)
- Case Chapter Case Study: Do Avatars Dream About Virtual Sleep?
- Assignment 2 Team discussion: Research Plan

### **February 21, 2017**

#### **Meeting 5**

- Chapter 5 Motivation and Affect
- Video New Toy Company Inspires Little Girls to Build Houses (2:10)
- Case 5 Chapter Case Study: Has the Death of the Watch Been Greatly Exaggerated?

### **February 28, 2017**

#### **Meeting 6**

- Chapter 6 The Self: Mind, Gender, and Body
- Video Online Shopping Gets Real (4:43)
- Case Chapter Case Study: Riding the Plus-Size Wave
- Assignment 2 due

### **March 7, 2017**

#### **Meeting 7**

- Chapter 7 Personality, Lifestyles, and Values
- Video Dunkin Donuts (10:29)
- Exam Midterm Exam

### **March 14, 2017**

#### **No class; Spring Break**

### **March 21, 2017**

#### **Meeting 8**

- Chapter 8 Attitudes and Persuasive Communications
- Video Brownstein Group (6:23)
- Case Chapter Case Study: A "Bad Hair" Day?

### **March 28, 2017**

#### **Meeting 9**

- Chapter 9 Decision Making
- Video Subaru (6:51)
- Case Chapter Case Study: Tesla Motors: Driving Forward
- Assignment 3 Team discussion: Research results

**April 4, 2017**                      **Meeting 10**

- Chapter 10                      Buying, Using, and Disposing
- Video                              Progressive (9:48)
- Case                                Chapter Case Study: Furnishing an Experience

**April 11, 2017**                      **Meeting 11**

- Chapter 11                      Groups and Social Media
- Video                              OXO: Advertising and Public Relations (6:57)
- Case                                Chapter Case Study: Never Stay Here! The Power of Negative Online Reviews
- Assignment 3 due

**April 18, 2017**                      **Meeting 12**

- Chapter 12                      Income and Social Class
- Video                              Cadillac (6:00)
- Case                                Chapter Case Study: Income and Social Class

**April 25, 2017**                      **Meeting 13**

- Chapter 13                      Subcultures
- Video                              Jones Soda: Marketing and Consumer Behavior (7:39)
- Case                                Chapter Case Study: Subcultures: Wells Fargo Banks on Embracing Same-Sex Marriage
- Project                              Presentations

**May 2, 2017**                              **Meeting 14**

- Chapter 14                      Culture
- Video                              Boston Harbor Cruises: Customer Driven Marketing (6:27)
- Case                                Chapter Case Study: Cultural Influences on Consumer Behavior: Marketing IKEA
- Project                              Presentations

**May 9, 2017**                              **Meeting 15**

- Project                              Presentations

**May 16, 2017**                              **Meeting 16**

- Exam                                Final Exam  
Special Time: 8 PM