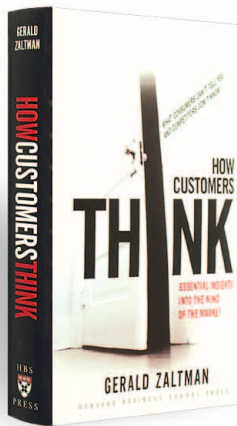


SOUNDVIEW Executive Book Summaries®

FILE: MARKETING



By Gerald Zaltman

Essential Insights Into the Mind of the Market

HOW CUSTOMERS THINK

THE SUMMARY IN BRIEF

Every marketing manager wants to understand what consumers are thinking. But between the mind of the consumer and the predispositions and biases in the mind of the manager, advertising campaigns frequently don't achieve their intended goal. In this summary, Gerald Zaltman explains how the brains, minds and memories of consumers work, and how marketers can effectively leverage that information in their strategies. He discusses the conscious and unconscious mind and how they work together to develop the metaphors and stories that drive consumer behavior. Marketers believe that they control the image of their brand, but really, it is what is in the head of the consumer that controls the individual image of the brand. Learning how customers think will allow you to affect them with messages that are relevant to their experiences and context, not just assail consumers with your perceptions of what they think.

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What You'll Learn In This Summary

- ✓ **You do not control your brand.** The brain and mind of the consumer are the key to effective marketing.
- ✓ **Common marketing misconceptions.** Incorrect assumptions about how consumers make purchasing decisions could be causing you to make serious strategy mistakes.
- ✓ **Discover the importance of metaphors and consensus maps.** They can determine what consumers really want and help you shape the stories consumers use to make decisions.
- ✓ **Memory is far more fragile than you think.** By understanding how memories are made and how they change, you can ensure consumers remember your products and services.
- ✓ **Think more creatively.** Once you understand the mind of the consumer, you must change your behavior to capitalize on that knowledge.
- ✓ **Ask better market research questions.** The questions you ask inform and predict the answers you hear, so consider carefully how you conduct and interpret market research.

HOW CUSTOMERS THINK

by Gerald Zaltman

— THE COMPLETE SUMMARY

What Marketers Need to Know

Effective marketing is a function of the mind, and in a world where approximately 80 percent of new products and services fail within six months, most managers do not understand their consumers' minds, their own minds, or the relationship between the two. Technology will explode in the coming years, and to exploit new opportunities, successful marketers must expand the range of disciplines that contribute to formulating strategy. Anthropology, psychology and sociology are no longer enough. Neurology, musicology, philosophy and zoology are among the new disciplines that will provide expanded insight for marketing strategy.

Current Limiting Theories of Use

Many managers handicap themselves with limiting views, such as:

- **Consumers think in a well-reasoned or rational way.** Consumers rarely assess benefits, attribute by attribute, and consciously balance the pros and cons of buying. The selection process is largely affected by emotion, the unconscious, and social and physical context.
- **Consumers can readily explain thinking and behavior.** Ninety-five percent of thinking happens in the unconscious mind. Verbal explanations after-the-fact attempt to make sense of behavior, but rarely explain what controlled it.
- **Consumers' minds, brains, bodies and surrounding culture can be studied independently of one another.** The mind, brain, body and external world all shape each other in dynamic ways, and the best information only comes from studying their interactions.
- **Consumers' memories accurately represent their experiences.** Memories are not always accurate representations of what happened, and they change over time.
- **Customers think in words.** The words expressed in surveys and focus groups only come after a person consciously chooses to represent unconscious thoughts out loud.
- **Consumers can be injected with company messages and interpret them as marketers intend.** Because consumers do not think in words, finding a clever way to express your company's message in words does not guarantee that consumers passively absorb it.

Falling prey to these misconceptions causes marketers to make predictable errors. They mistake descriptive information for insight by making assumptions about what consumers say. For example, a customer may say she prefers round containers to square ones. But unless you know why, you may not realize that round containers are still not optimal, and she would prefer something else entirely. Managers also confuse customer data with understanding by collecting huge quantities of easily accessible data, particularly demographic data. They focus on the wrong elements of the consumer experience by spending 90 percent of market research on surface-level attributes and functional features and their immediate psychological benefits. You must learn to understand the full consumer experience and the deeper emotional benefits.

Customer-Centricity

The key to understanding the full customer experience is customer-centricity, the **degree to which marketers focus on latent and obvious needs of current and potential customers.** It involves:

- The customer hearing and understanding that a product merits a purchase.
- The firm hearing and understanding what current and potential customers are saying about their deep thoughts and feelings.

Customer-centric firms understand that customers must be skillfully heard, not aggressively sold to. They know that people interpret the same data differently, so products appeal equally to people with different points of view. ■

The author: Gerald Zaltman is a professor of marketing at Harvard Business School and a fellow at Harvard University's interdisciplinary Mind, Brain Behavior Initiative. He is also cofounder of the research and consulting firm Olson Zaltman Associates.

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The Brain

Marketing is in the mind, which is in the brain. The cerebral cortex, the outer covering of the human brain, is where cognition occurs. It is made up of 30 billion neurons that form a vast network of possible connections and thoughts. The brain interacts with the mind, body and society to create the new paradigm for marketing. No part works without the others. This mutual influence structure shapes the thinking and behavior of each marketer and consumer, and that is further complicated by interactions between the conscious and unconscious processes. The unconscious level is where dynamics are most active, and marketers consistently fail to tap into it.

Marketers who ignore the importance of the unconscious level doom themselves to the old mistakes. In the new paradigm:

- **Thought is based on images, not words.** Neural images based on words or visual images make up thought, not discrete words.
- **Most communication is nonverbal.** As much as 80 percent of human communication involves gestures, body posture, eye contact and paralanguage — tone and manner of speech. Paralanguage can affect telemarketing, selling and voice-over advertising.
- **Metaphors are central to thought.** Metaphors are so prevalent that we are often unaware of them. They stimulate the mind, help us perceive the world around us, and allow us to surface unconscious feelings.
- **Emotion partners with reason.** Most marketers have a reason-centered bias in their research, but emotion should not be separated out.
- **Most thought, emotion and learning occur without awareness.** Often people do not know that they have knowledge until they synthesize it with other data to come up with information.
- **Socially shared mental models are important.** Mental models help to filter information so that it is manageable. When groups of people share important features of mental models, they are called consensus maps and they are possibly the single most important set of insights a manager can have about consumers.
- **Memory is fragile.** Memory is actually a creative product of our encounters, beliefs and plans that is developed on a subconscious level. ■

Illuminating the Mind

Ninety-five percent of the human mind is part of the cognitive unconscious, while only five percent is higher-order conscious thought. Even though most thought processes, decisions and opinions happen in the uncon-

The Unconscious Mind

The following mechanisms support the work of the unconscious mind:

Priming. The mind can be prepared for information that it wouldn't normally recognize. If you converse with someone who mentions the word "doctor" several times, and then look at a nonsensical sequence of letters containing the letters "n," "u," "r," "s" and "e," you are more likely to pick out the word nurse.

Adding Information. The mind can add information to a situation to create a context it understands better. Consumers add experiences and qualities that they expect to be present, such as experiencing smooth taste and a relaxing feeling from their favorite beverage when these qualities do not exist in a blind taste test.

Subtracting Information. The mind subtracts information it does not expect or is not focused on. When asked to watch a video of a small group of people passing a basketball and count the number of passes, viewers do not recall seeing a gorilla walk past the group. When people watch the video without instruction, they see the gorilla.

scious, the self-awareness and self-reflection of the unconscious by the conscious mind is what makes us human. It helps us make considered choices in our complex social world.

We take in so much information; it is consciousness that allows us to filter all of that data to plan and organize choices. Managers and researchers focus on consumers' conscious thinking and apply their own conscious interpretations because it is easy. But they ignore that the *unconscious mind drives most consumer behavior*.

Many conscious actions are the result of earlier choices. Unconscious judgments happen before and guide conscious judgments.

For instance, in a study of patients who received a placebo painkiller during a typically painful dental procedure, patients only experienced a lack of pain if the dentist also believed the treatment was an authentic painkiller. Dentists who knew the placebo was fake, but consciously acted like it was a painkiller, still unconsciously communicated to patients. Tapping into the unconscious can improve a marketer's ability to mine for consumer preferences. ■

For Additional Information about the unconscious mind in action, go to: <http://my.summary.com>

The Importance of Metaphor

Once you understand how important the mind is, you will need to elicit information from it. Marketers have several research methods at their disposal, and they should always use more than one to ensure the information they receive converges on the same insight. Traditional methods, such as surveys and quantitative analysis of scanner data, work on tactical decisions, such as packaging and attribute bundles. But to get to larger strategic issues, marketers must access information in the cognitive unconscious that consumers might not be able to articulate.

Defining Metaphor

Penetrating the mind through metaphor is an effective method of targeting the cognitive unconscious.

Metaphors — defined broadly as similes, analogies, allegories and proverbs — reveal cognitive processes and information beyond what literal language may misrepresent or miss completely. They have a neurological basis and are a fundamental aspect of how the mind works. By using them, you can answer questions you never knew to ask. Firms such as Bank of America, Samsung Electronics, and P&G have used consumer metaphors to generate new product and service ideas. The challenge is how to make explicit the implicit thinking about the metaphors in every consumer's mind.

Humans tend to use embodied cognition — metaphors referring to physical motion, bodily sensation, or sensory experience — because metaphor is primarily a way for people to learn about and navigate through the world around them: “Those rules stink,” “She’s a pain,” “He’s falling behind.” Because embodied cognition is so basic and universal, it is often overlooked as metaphor, but if recognized, it can provide keen insight into the mind.

Metaphors do not exist as words in the subject's mind but as part of *consensus maps*, or networks of abstract understandings. For instance, the consensus map below shows consumers' understanding of Chevrolet trucks in response to “Like a rock.” The tagline inspires four basic associations in a consumer's mind: “Rock” is associated with “Take Abuse;” “Chevy Truck” with

“Reliable, Rugged;” “Chevy Truck” with “Rock;” and “Take Abuse” with “Reliable, Rugged.”

Using Metaphor

Metaphors are the primary means of communication between companies and consumers. Consumers' needs are metaphors that represent potential product ideas and the company's offerings are metaphors of potential solutions to problems. Effective metaphors in advertising can strongly influence customers, by allowing them to “see” information that is not actually in the text or graphics. For instance, people believe a beverage ad depicting a koala bear indicates the drink should be consumed warm. With a polar bear, the drink should be consumed cold. Each bear represents a shared metaphor for temperature. An ad with a koala bear and a cold beverage produced confusion in consumers.

It is difficult to elicit useful core metaphors, instead of cursory surface-level information, especially when the consumer may not

even be aware of his or her needs or desires. Core metaphors generate positioning ideas, guide development of image and advertising strate-

gy, represent profound needs, and signal new product opportunities. Metaphor elicitation involves one-on-one discussions about broad topics that are not necessarily related to the project at hand. For example, GM developed design ideas for cars by asking consumers to bring pictures of watches they found to be friendly and those they found to be fun. The subtle variations in design features on the watches showed them how small design differences for a car could make different statements.

These metaphor-eliciting questions should be probing, not prompting. Probing questions allow the participants to respond in multiple, unexpected ways, while prompting or leading questions affirm the expected answer in the manager's mind.

There are other methods of discovering what lies in the unconscious mind. Response latency techniques measure how long it takes respondents to answer questions, indicating implicit hesitancy about explicit answers they give. Priming and neurological scans of the brain also work. Focus groups, however, are not useful. With six to eight people talking over an hour or two, there is not enough deep conversation to elicit any core implicit, explicit or behavioral information. ■

Penetrating the mind through metaphor is an effective method of targeting the cognitive unconscious.

Metaphor Structure for Chevy Trucks



For Additional Information on how to probe for metaphors, go to: <http://my.summary.com>

Consensus Maps

Marketers know that consumers' thoughts shape their preferences and choices about products and companies. The problem is that many thoughts remain in the sub-conscious — influencing consumer behavior without the knowledge of that consumer.

Eliciting metaphors is one way to “access” those sub-conscious thoughts driving consumer behaviors. Built from metaphors, consensus is another important tool for peering into consumers' unconscious minds.

From Thought to Construct

What are consumers thinking? For many marketers, the answer to this question lies in observation. Look at what consumers are saying or how consumers are behaving, and you can deduce the thinking behind that behavior.

For example, consumers might say, “I would never switch brands,” or consumers might go out of their way to buy a familiar brand. Marketers capture the thoughts behind such statements and behaviors and give them a label: “brand loyalty.”

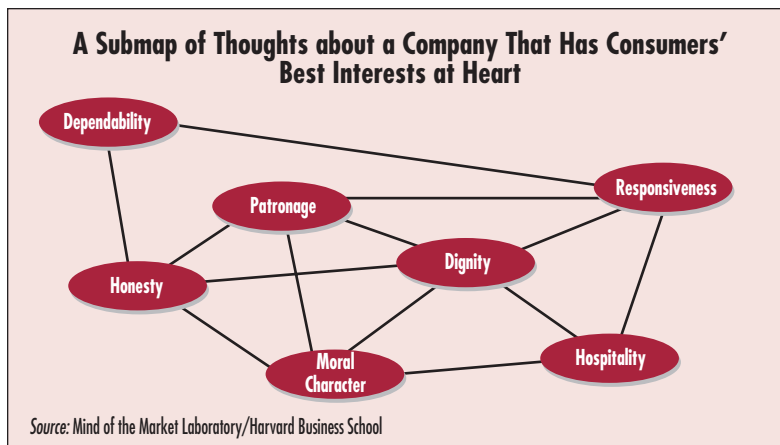
These labels are called *constructs*.

What's important to remember — and what some marketers forget — is that constructs, such as brand loyalty, are based on the marketers' *interpretation* of consumers' thoughts and behaviors; they are not the actual thoughts and behaviors. Constructs are valuable because they are means of summarizing thoughts and behaviors.

Association Between Constructs

In isolation, constructs have little meaning. The construct “escape” doesn't tell us much. The construct “escape” connected with the constructs “work” or “relief” conveys more meaning: We are talking about avoiding stress, not physical danger.

Constructs gain meaning and become more multifaceted the more they interact with other constructs. **It is the associations between constructs that drive consumer behavior.**



Using Consensus Maps

When working with consensus maps, ask these questions:

- Which constructs should we analyze further?
- What do we convey to consumers relative to each construct?
- Do we activate these constructs in negative ways?
- Do we plan the signals about each construct or leave them to chance?
- How do we score compared to competitors?
- How do we score on the quality and strength of associations between constructs?
- Who within the company is responsible for each construct and association?
- Are we doing anything with one construct that adversely affects another?

For instance, a customer entering a car showroom may activate his or her vulnerability and (lack of) expertise constructs. Primed by a friend's tale of a bad car dealership experience, the customer will seek confirming evidence, such as an aggressive salesperson, trophies in a cubicle, and a Styrofoam coffee cup with images of predator and prey. These may prime the fight-or-flight response and the potential customer spends less time in the showroom, and doesn't buy a car.

Consensus maps allow you to understand the associations between constructs. They show the thoughts and feelings a group of consumers shares about a topic that are connected in similar ways.

The figure below is a simple consensus map showing the relationship of constructs about a company that consumers believe has their best interests at heart.

Twelve to fifteen two-hour interviews using metaphor-elicitation techniques with representative consumers can yield a consensus map that represents the majority in that market segment. These consensus maps help you identify commonalities and understand how they interact. Once you understand the maps, it is possible to change them for new marketing plans or over time as strategies change. They become road maps identifying opportunities for and obstacles to a successful marketing effort.

Also note that different consensus maps can share constructs. When a button is pressed in one map, it may affect another map. Because they reflect the shared frame of reference in the target market, consensus maps also change as the consumer changes, even as consumer changes are affected by your own marketing efforts. ■

The Fragile Power of Memory

Another important part of the consumer mind is memory. Despite their importance, memories are malleable, and can fade and change every time they are tapped. Though they are often distorted, they still affect behavior. In order to influence *what* consumers remember about your product, you must understand *how* they remember.

As the brain absorbs information, electromagnetic etchings called engrams appear on the brain. They can become short-term memory and be quickly forgotten or they may become long-term memories. These engrams are activated by cues or stimuli, and **it is your job as a marketing manager to use cues to incite the memories that will cause the customer to buy your product.** The memories that become long-term are affected by the goals and purposes of the person.

The three kinds of memory are:

- **Semantic** — Memory that recalls words and symbols, such as the Nike swoosh.
- **Episodic** — Memory that involves time, space and situational aspects of events, such as a trip to Disney World.
- **Procedural** — Memory that involves learned skills, such as riding a bicycle.

Memory can be explicit and voluntarily called to mind or it can be implicit and unconscious. The most powerful memories are usually those locked in the unconscious. You must prod them out through priming and cues. For instance, a picture of someone being helped at a service counter in a setting with a wall clock is more than twice as likely to evoke the idea of speedy service as the same image without a clock.

The Importance of Forgetting

Memory works closely with forgetting. If you did not forget some things, you would be distracted and unproductive. But, in order to retrieve forgotten memories, the stimuli must be deeply encoded. *Associative retrieval* occurs when a stimulus involuntarily triggers a related memory, for example, seeing an image of a pie and remembering your aunt who baked pies on Sundays. *Strategic retrieval* is voluntary, when you are looking for a specific memory.

Context is important for both types of retrieval. The mood and situation that existed when the engram was encoded determine the likelihood of an enduring memory, and can help determine which clues will prompt the memory. The pages surrounding an ad or the environment in a store can affect mood, and thus the memory of your product. Unfortunately, the time when the engram transitions from short-term memory to more enduring long-term memory is often when it is most susceptible to distortion. The length of the transition and susceptibility to distortion is based on the complexi-

ty of the information.

Every time we remember an experience, we are responding to different cues. Negative or positive prompting cues, including mood or environment, can change memory during retrieval without us even knowing. Marketers use backward framing to refer to a previous experience. They can change the perception of what a customer recalls of a prior product or shopping experience by referring to it in positive ways. Forward framing allows marketers to influence consumers' expectations about future experience, which will affect their future experience and future memories. You should strive to design memory-shaping environments that alter how consumers recall your company's brand. ■

For Additional Information on the Encoding of Memory, go to: <http://my.summary.com>

Stories

While metaphors explain one thing in terms of another and memory is a window to a past experience, stories narrate a past, present or future event. All three contain truths, fiction, thoughts and emotions. By fusing them together, the consumer can find personal relevance in your company or brand.

Humans tell stories all the time. It is how they remember. Specifically, they tell stories about themselves to define their self-identity, and marketing managers provide the props. Stories draw on personal memories, which are ultimately social, because they are developed and defined by society. The stories we hear as children become important frames of reference, because they include cultural artifacts, events and rituals powered by products and brands that are part of our memories. Social memories produce personal memories using the following:

- **Norms** — Guidelines that govern aspirations or behaviors.
- **Senses** — Guides to help us understand our external world and represent it internally as memories.
- **Rituals and Rites** — National and religious holidays and personal events.
- **Icons** — Brand names, packages, logos or other symbols.

A story is a combination of episodic and semantic memory. They can become metaphors when we compare them to experiences we already understand. Marketers help consumers create stories about brands through the information and experience they provide prior to, during and after the shopping experience. Stories ultimately are based on the consumer's version

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Stories

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of the truth, not necessarily the facts. Successful brands help consumers create stories full of promise about who they are and what they believe they can become. For example, the Corvette brand/story makes drivers feel cool and sexy.

Consumers use both their unconscious and conscious minds to make decisions based on stories that incorporate their beliefs about themselves and their knowledge, even if they are not the same thing. They make decisions based on functional benefits and emotional benefits at the same time, so marketers should present drivers of each as closely together as possible. Carefully select and design cues so that consumers can construct favorable stories. What people know and remember constitutes the ingredients for storytelling, the representation of beliefs, which then become metaphors. ■

Stories and Brands

Brands are simply a form of storytelling that are co-created by managers and consumers. They are subconscious stories for a loyal buyer and conscious stories for new customers. Consensus maps are the filters that consumers use to assess marketing stimuli; stories embellish these maps. Though brands and stories cannot be the same in two different minds, they are made up of archetypes or images of essential, universal commonalities across a variety of experiences. All societies share archetypes, such as the hero or villain, and they help us make sense of life's challenges, behave properly, and understand who we are.

Since advertisers cannot be in every mind, they must use archetypes to influence stories and build them around a universal theme or core metaphor. Be careful not to use stereotypes, which are based on settings and surface ideas. For instance, a homemaker's pleasure at using a certain household product is stereotypical. A homemaker's major error and subsequent redemption by selection of your brand has a deep resonance with the archetype of the hero's journey.

Overlapping a deep metaphor from the consumer's unconscious mind and an archetype is a great way to affect the brand, since archetypes contain important cultural information that people retrieve from cultural stories already in their memories. Consumers often describe their shopping experience as an archetypal hero's journey with digressions, temptation, danger, challenge and the return of the conquering hero. ■

For Additional Information about archetypes,
go to: <http://my.summary.com>

Memory, Story and the Self

Everyone has different selves to help them remember different things in different ways for different reasons. These selves provide opportunity for helping consumers create relevant stories:

Ecological self — The self that exists in a particular setting.

Interpersonal self — The self that interacts with others.

Extended self — The self that experiences events in the present by remembering the past and anticipating the future.

Private self — The self that responds to events in uniquely personal ways.

Conceptual self — The self that is aware of other selves.

Consumers are most likely to accept offerings consonant with their conceptual selves. This is also the self that wants other people to resemble it, so it teaches and gives advice. Together all the selves provide a container for memory. By understanding which self is likely to be involved in memories for your products and services, you can engage that self in your marketing strategy.

When the physical brain constructs stories, it interprets thought and emotions through a consensus map. As new thoughts occur, they prime additional thoughts, and the brain creates an entire story. Marketers believe that they can inject a story of a brand into consumers, but actually **consumers create their own story in response to an ad**. You should not ask what consumers like or do not like about an ad, what they remember about an ad, or their attitudes toward the brand. You should focus on how memory, cues from nonmarketing sources, and marketing efforts are presented in the consensus map that creates their story. Consider asking the following questions about the effectiveness of an advertisement using the concepts of storytelling and metaphor:

- What meanings about the brand do consumers acquire and generate?
- What meanings do consumers form about the product category?
- How much meaning results from ad content and how much comes from the consumer's own frame of reference?
- Do consumers form the same meanings specified in the marketing strategy?
- Does the ad permit different stories with the same underlying metaphor?
- Are these multiple stories consistent with the intended message?
- How much effort does it take for the consumers to form meanings and stories?

(continued on page 8)

Memory, Story and the Self

(continued from page 7)

The meaning of a brand resides in the mind of consumers, and they ultimately create brand meaning. You can influence that meaning with critical raw materials such as icons, metaphors and phrases, but you cannot control how consumers create that meaning. And that meaning exists in several forms. There is the surface meaning, including physical attributes or functional consequences of using the product, and the deeper meaning, including psychological consequences of brand. ■

Understanding Your Own Thinking

Tapping into consumers' thinking is not all you need to do. You must also understand your own unconscious thoughts about consumers and marketing. To consider new ideas and shape your own thinking, you must face these four challenges:

- **Create or identify new ideas.**
- **Understand new ideas that you encounter.**
- **Critically examine those ideas.**
- **Leverage them imaginatively in your own work.**

Think out of the box, but be prepared for what that means. Creative thinking involves many of the same processes as all thought, such as imagery and metaphor. People with diverse experiences are best at it. Also, few companies genuinely welcome creativity. It is hard to change comfortable processes. Look for ideas outside of the marketing discipline, and blend knowledge from seemingly unrelated disciplines. Finally, realize that you will inevitably jump out of one box into another. People who are creative and successful in new boxes are able to take patterns and metaphors from one set of experiences and apply them to another. ■

Thinking Creatively

Based on the observations of some of the most imaginative executives, here are 10 “crowbars” that will pry managers loose from conventional thinking:

- 1. Favor restlessness over contentment.** Look for innovation by reexamining patterns of thought, familiar meanings and underlying assumptions.
- 2. Wonder about the cow's crumpled horn.** In the story “This is the House that Jack Built,” an entire stream of events happens because of a cow with a crumpled horn. Irregular or aberrant data can generate valuable new ideas and strategies.
- 3. Play with accidental data.** Creative thinking requires active play to decipher useful meaning where

initially you see none.

4. View conclusions as beginnings. When you think you have solved a problem, ask more questions to reveal what is still concealed.

5. Get outdated. Make what you currently know look out of date as soon as possible to make progress instead of celebrating the status quo.

6. Stop squeezing the same baby chicken. Becoming overly attached to a new idea and holding it very tightly, like children do to baby chickens, is not healthy.

7. Nurture cool passion. Passion fuels creative thinking while coolness harnesses its energy. Integrate the two without censuring the process of creative thinking.

8. Have the courage of your convictions, not someone else's. Do not be swayed by the people who say “Yeah, but ...” when you have an idea. Do not let their lack of creativity prevent you from innovating.

9. Ask generic questions. What are the fundamental human or social processes you are seeking to examine when you conduct marketing research? How would other disciplines view the issues, and how can you apply knowledge from other disciplines?

10. Avoid premature dismissal. Do not dismiss ideas before asking what the consequences would be if they were true. ■

Quality Questions and Answers

The questions you ask while conducting market research shape the ultimate learning about consumers. Instead of focusing on answers and conclusions, pay equal attention to questions and beginnings, because the framing of your questions foreshadows your answers. Frame effective research questions by doing the following:

- **Determine the generic question you want to explore.**
- **Determine whether the basic question should be specific to brand, category or problem.**
- **Pose more general and specific versions of the first question that comes to mind.** Viewing this information framed at other levels may be more useful.
- **Determine whether you need to know direction, velocity or both.**
- **Allow for surprises.**
- **Convert assumptions into questions.**
- **Employ a clairvoyant.**
- **Employ a wizard.** Protect against potential knowledge deficiencies by asking what one thing would a wizard most likely fix.
- **Data are all stimuli that influence our thoughts, feelings and behavior, so you should collect multiple kinds.** ■