

# **The ZMET Technique: A New Paradigm For Improving Marketing And Marketing Research**

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## **Abstract**

For decades, marketing and marketing research have been based on a concept of consumer behaviour that is deeply embedded in a linear notion of marketing activities. With increasing regularity, key organising frameworks for marketing and marketing activities are being challenged by academics and practitioners alike. In turn, this has led to the search for new approaches and tools that will help marketers understand the interaction among attitudes, emotions and product/brand choice. More recently, the approach developed by Harvard Professor, Gerald Zaltman, referred to as the Zaltman Metaphor Elicitation Technique (ZMET) has gained considerable interest. This paper seeks to demonstrate the effectiveness of this alternative qualitative method, using a non-conventional approach, thus providing a useful contribution to the qualitative research area.

Keywords: consumer behaviour, stimulus-response models, qualitative marketing research, ZMET

## **Introduction**

For decades, marketing and marketing research have been based on a concept of consumer behaviour that is deeply embedded in a linear notion of marketing activities. This notion has been expressed in various forms, including steps in the selling process, (Strong, 1925), adoption of innovation (Rogers, 1961), the hierarchy of effects (Lavidge and Steiner, 1961), and advertising goals measurement (Colley, 1961). Although this concept has been challenged from time to time (Palda, 1966; Weilbacher, 2001), it has endured as a key organising framework for marketing and marketing activities. However, confronted by change, technological advancement, competition and the unpredictability of a market economy, today's marketers have been compelled to seek a deeper understanding of the connection between brands and consumers. In turn, this had led to the search for new approaches and tools that will help marketers understand the interaction among attitudes, emotions and brand choice (Woodside, 2004; Carbone, 2003; Catchings-Castello, 2000).

Within this search has been the work of Zaltman (2003), Schultz and Schultz (2004) and others who have challenged the stimulus-response paradigm implied in hierarchical behavioural models. Static concepts, whereby a brand generates a certain enduring perception in the customer's brain, are said to be out of touch with today's buyers. Zaltman and Coulter (1995) claim most communication is nonverbal and non-linear, while 95 percent of decision-making occurs in the subconscious mind. Thus, the way in which thoughts occur may be very different from the way in which they are communicated. Cognitive scientists acknowledge that people think in images, not words; however many of today's marketing research techniques rely on verbo-centric communication (i.e. literal, verbal language), as a data-collection method (Woodside, 2004; Catchings-Castello, 2000). Woodside cites several literature streams that support the claim that such highly cognitive methods exclude data collection of most thoughts. This suggests that concepts behind the massive investment in market research are flawed. Thus, the purpose of this paper is to present an alternative research paradigm (grounded in the tradition of qualitative research) and to demonstrate the challenges and opportunities within a specific research technique.

## **Background Literature**

### **Interpretation of the Existing Paradigm**

A number of linear models describe how organisations create value, strong brand associations and meaningful differences in the minds of consumers to create a distinct and meaningful brand position (Trout and Ries, 1972; Aaker and Shansby, 1982) and represent how people make brand choices (Aaker, 1996; Duncan and Moriarty, 1997; Park, Jaworski and MacInnis, 1986). Many were developed on straightforward, psychological, stimulus-response models based largely on conceptual and/or theoretical foundations that had little, or no, empirical evidence to support the underlying presumption that thinking (and behaviour) is linear and hierarchical (Schultz and Schultz, 2004). Most of these models also largely ignore the role of emotion (Vence, 2005). Such models are typified by the idea that knowledge or value is accrued at each stage of the process—consumers move from passive awareness to information gathering, to trial and finally adoption. At the same time, it is clear that consumers do not always make decisions deliberately, following a rational thinking process and logical judgment (LeDoux, 1996). In the same way, experiments by Gazzaniga and LeDoux (1978) also found neural and other physiological mechanisms underlying emotional experience, whereby physical reaction occurred before understanding and comprehension. This conveys the occurrence of subconscious processes that defy the fundamental principles of linear-type models. Thus, more recently, authors have challenged decades-old schools of thought in favour of a new paradigm, contending that thinking processes are more often non-linear, predicated by memories, emotions, thoughts and other cognitive processes that an individual is not aware of or can't articulate (Zaltman, 2003; Schultz and Schultz, 2004).

### **Appeal and Application of New Paradigm**

Coulter and Zaltman (1994) contended that an imbalance exists in the way customers think and communicate about brands and also how researchers access customers' thinking. According to Zaltman (1996), thinking and knowing is dependent upon the fundamental representation of one thing in terms of another. In other words, metaphors are central to cognition—people conceptualize objects and ideas in terms of other objects and ideas. This is in line with Bruner's (1957) philosophy of the "so-called laws of thought", which involves the combination of metaphors, related images and memories. Furthermore, 80 percent of all human communication is said to be non-verbal; paralanguage (tone, pitch and other speech qualities) and other non-verbal cues, such as body language influences the meaning of the spoken word (Zaltman, 1996). Hence, a technique that enables participants to convey their thoughts in non-verbal terms (i.e. through the use of metaphors) will enable the researcher to probe deep thought structures to learn more about how consumers think and feel. The Zaltman Metaphor Elicitation Technique (ZMET) offers the potential to explore the interconnected constructs that influence thought and behaviour, using images in non-verbal terms to tap into underlying subconscious thought process and associations. From this perspective, the significance of non-linear thinking—which is linked to emotions—and the influence on brand choices is highlighted, posing an interesting research opportunity.

### **Sample Context for Exploration: The Higher Education Sector**

Relatively little research has been undertaken in the area of higher education branding. Given changes in the economic environment, research that informs marketing communication strategy in this high-growth sector offers significant value. Thus, as competition intensifies in

the academic arena, the impetus for marketers of higher education to understand how to influence university choice becomes increasingly important. Higher education could be described as a classic situation where there is a high likelihood that prospective students (customers) follow a linear model in their decision making—i.e. rational processes where information is accrued at each stage of the process to arrive at an informed judgment about a university (brand). Conversely, the highly subjective and complex nature of university selection means that decision-making is often formulated on the basis of symbolic, intangible elements, such as brand (Duncan, 2001). In this way, emotional responses can shape the way a brand is viewed, without conscious awareness. If current marketing and communication models and theories are incongruent to the way in which people receive, synthesize and evaluate information, then how effectively are universities communicating with their stakeholders? In response to such disparity, an exploratory study will investigate the implications of non-linear thinking to branding in the context of the tertiary sector. This research attempts to understand the underlying dynamics of influence, outside the spotlight of consciousness. The assumption is that valid insights will emerge to better understand the mind of the market in order to shape attitude and change behaviour.

### **Significance of the Study**

#### **Application of the Zaltman Metaphor Elicitation Technique (ZMET)**

This study responds to recent challenges for techniques that better measure consumers' emotional attachment to a product or service (Vence, 2005) and explores latent processes, behaviour and emotions (i.e. non-linear and often sub-conscious thinking processes) that shape attitudes and perceptions toward a brand. The power of subconscious, deep-thought processes, mixed with memories and emotions unmistakably plays a crucial role in shaping perceptions, attitude and behaviour toward the brand, yet the subconscious appears to elude traditional marketing research approaches. This indicates that alternative study is necessary to probe cognitive and conative elements that may influence decision-making processes. As such, research that attempts to mitigate the limitations of verbally-focused response data will underscore the effectiveness of the market offering and decision-making behaviour, offering valuable insights into how the consumer mind works. On this basis, this study employs techniques outlined in the Zaltman Metaphor Elicitation (ZMET) method. The task of adopting this non-traditional, qualitative approach requires significant skill as an interviewer, coupled with a strong familiarity of the disciplinary foundation of the technique (Zaltman, 1996). Thus, a small pilot study was conducted initially to facilitate the necessary training and experience required to effectively replicate ZMET. Once a level of competency and rigour has been achieved with successful application of the method, further study (beyond the scope of this paper) can be attempted with a larger sample to investigate research aims more widely.

#### **Implementing the Technique**

This research project moved away from traditional data collection methods and sought to replicate the approach suggested by Zaltman, using metaphors as a device to tap into unconscious thoughts, attitudes and perceptions of respondents. Purposive sampling was used to recruit three prospective students based on qualifying screeners (interest in postgraduate business study, not a former graduate of the institution) and diversity of the candidate's profile: demographic variables (gender, age), mode of study (ie. full- or part-time), degree, discipline and academic history/GPA (where available). Reliability and validity of outcomes

are questionable due to the small sample size; however provide useful developmental threads for a larger study. Thus, sampling strategies attempted to isolate patterns and dissimilarities across a range of relevant variables, rather than a homogenous sample profile.

Participants were sent a letter via email with a set of instructions and guidelines about the research topic. The instructions requested that participants bring pictures (from magazines, books, newspapers, photos taken specifically for this assignment and other sources) to the interview that indicated what a specific university brand (large, public university in Australia) meant to them. Participants were instructed not to bring pictures or images that explicitly illustrated the topic (e.g. campus photos, advertisements, corporate logo, and the like), but represented metaphors of the university. Personal interviews (requiring approximately two hours to conduct) were scheduled approximately three weeks after the participants were recruited and briefed. The interviews employed a guided conversation approach, rather than a traditional structured or semi-structured interview. The relaxed and informal nature of the interviews was considered a key factor of low incidence of respondent fatigue. This was perhaps compounded by the relative novelty of the ZMET method, plus the variation of tasks undertaken throughout the interview in following the ZMET interview process.

Interviews followed the ten ZMET steps as outlined by Zaltman and Coulter (1995):

- Step 1: *Storytelling*. Participants were asked to describe the content of each picture.
- Step 2: *Missed issues and images*. Participants were asked to describe any issues he/she was unable to find, to describe a picture representing the issue and explain its relevance.
- Step 3: *Sorting Task*. Participants were asked to sort pictures into meaningful piles and to provide a descriptive label for each pile, thereby establishing major themes.
- Step 4: *Construct Elicitation*. A modified version of the Kelly Repertory Grid and the laddering technique (Kelly, 1963; Gutman, 1982; Reynolds and Gutman, 1988) was used to elicit basic constructs and their interrelationships.
- Step 5: *Most Representative Picture*. Participants were asked to select the picture most representative of the brand's image.
- Step 6: *Opposite Images*. Participants were asked to describe pictures that represent the opposite of the brand's image.
- Step 7: *Sensory Images*. Participants were asked to use other senses (touch, taste, smell, sound, colour and emotional feeling) to describe what does and does not represent the concept being explored.
- Step 8: *The Mental Map*. The interviewer reviewed all of the constructs discussed and asked the participants if the constructs were accurate representations of what was meant and if any important ideas were missing. Then the participants were invited to create a map or a "causal model" using the constructs that were elicited.
- Step 9: *The Summary Image*. Participants were asked to create a summary image or montage using his/her own images to express important issues.
- Step 10. *The Vignette*. Participants were asked to create a vignette or short video to communicate important issues related to the subject topic.

Analysis of the data will be presented at the 2005 ANZMAC Conference. Acknowledging Zaltman and Coulter's contention that the ability and experience of the researcher plays an important role in providing valid and reliable data, a senior academic led the guided conversations during the data collection and subsequent analysis of the data. Extensive knowledge of the discipline under investigation and life experience in numerous research contexts underscores interpretation of subjective meanings and discovering patterns and connections in the data. Caveats of "experienced interviewer" and "careful probing" are noted

as significant limitations of the method, as well as time consuming and expensive. Trustworthiness of interpretations made (interpretive rigour) has greater validity due to the nature of the method, whereby participants—not the researcher—have greater control over the stimuli used in the guided conversations and serves to enhance authenticity in the way that their views are represented (Fossey, et al., 2002). In reporting the data, evidence to indicate how well the researcher’s own assumptions, understanding, and interpretations have been influenced by observations made or information gathered (permeability) will be communicated.

## **Outcomes and Implications**

From a theoretical standpoint, this study contributes to the growing literature that challenges previous assumptions of how the human mind works, particularly in relation to how consumers think and feel about brands. Additional insights that challenge marketing practices in higher education are anticipated. For example, the study provides insights on what perceptions are held by one of the multiple audiences—prospective students—of a tertiary institution in relation to marketing communication. Further, the study evaluates the findings in terms of cognitive processing and congruence to positioning and branding theories. In this way, gaps may emerge between consumer perception and the brand image desired by the institution. It is also expected that applied insights will emerge, thus compelling higher education administrators to rethink traditional marketing approaches. In addition, testing the effectiveness of this alternative qualitative method by way of a small pilot study provides a useful precursor that signals the viability, usefulness and practicality of applying this qualitative technique to a broader project and within other sectors.

## **Conclusion**

One of the criticisms of research in marketing is that it is often limited to the collection of standardised data on consumers that fails to go beyond statistical or verbal description (Gummesson, 2004). Scientific methods are said to be “ill-equipped to develop an understanding of subjective experience, meaning and intersubjective interaction” (Fossey, et al., 2002, p.718). Hence, data from this inductive approach is expected to inform reasoning about the attitudes and perceptions of prospective students. By combining nonverbal images with verbal communication, more meaningful messages are anticipated that will better resemble consumers’ deep-seated thoughts and emotions toward the brand. Consequently, the method lends itself to offering deeper understanding, while providing a platform for future research that can test emergent patterns with a mixed technique approach.

Early results by Zaltman and others who have replicated the technique suggest the method has merit, despite its complexity and labour intensity. Small sample sizes also rule out population projectability; however, as with most qualitative methods, the main focus is to gain rich insights rather than being concerned with generalisability. More concerning is that most, if not all, published studies to-date have been conducted by researchers specially trained in the ZMET approach. Catchings-Castello (2000) observed that, in the spirit of good research conventions, Zaltman is keen for other marketing researchers to expand on his research. Nevertheless, the proprietary nature of his technique and stated limitations preclude its wide-spread use and application. With interest from both academics and practitioners growing in what some call “a revolutionary research tool”, this pilot study demonstrates the effectiveness of this alternative qualitative method, using a non-conventional approach, thus providing a useful contribution to the qualitative research area.

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