

The seven universal

David Murphy talks to Gerald Zaltman about his acclaimed ‘Deep Metaphor’ research methodology and what it means for marketing.

Gerald Zaltman is a man who likes to think deep. In his book, *Marketing Metaphoria: What Deep Metaphors Reveal About the Minds of Consumers*, co-authored with Lindsay Zaltman, the emeritus professor at the Harvard Business School, and recipient of numerous awards for his contributions to marketing thought and practice, examines the universal drivers of human behaviour – so-called deep metaphors – that are vital to a firm’s success. He explains why they are so often ignored when new products and services are being developed.

So what are these deep metaphors, and how does Zaltman get to them? Are we entering the realms of neuroscience? Zaltman says that neuroscience can have a role to play but adds “It’s all about getting to know the content of thought. This is very important, particularly since very different thoughts and feelings may produce the same neural and other biological signatures. Tools associated with neuroscience can be very helpful in identifying the presence of positive or negative emotions and their relative strength. But they do not reveal the particular content of specific thoughts and feelings that are being activated.”

In-depth interviews

To get at this content, Zaltman and his research and consulting firm Olson Zaltman Associates use in-depth, two-hour, one-on-one interviews, known as ZMETs (Zaltman Metaphor Elicitation Technique). These use a variety of techniques, involving storytelling, visualisation, and metaphor elicitation. The probes used during these interviews, says Zaltman, allow consumers to look inward and share with the interviewer the insights they uncover about themselves.

To get the most out of the interviews, the participating consumers are provided with an assignment about the client’s issue a few days before the interview, so that they arrive in an advanced state of readiness to go beyond surface-level thoughts. “Our interview is carefully designed to probe various facets of the mind’s operation, enabling the consumer to be more explicit about their implicit thoughts and feelings,” says Zaltman. “This increases the likelihood of surfacing important but often hidden drivers of behaviour.”

Afterwards, each interview is transcribed, and a lot of time is spent analysing each interview and the pictures or other stimuli consumers bring to the interview. “We identify basic constructs, their associations, and the larger themes and frames that emerge. We then look across the various interviews for important similarities and differences among consumers,” says Zaltman. “The resulting insights, often in the form of a mental model and deep metaphors, become a strategic playing field for managers. These are often used to develop and assess new product ideas, find better ways to segment markets, reposition and differentiate products, improve experiences with existing products, their packaging, understand purchase settings, and to develop and improve marketing communications.”

Evidence of success

Zaltman has plenty of evidence to show that the technique works. He cites just one, a food products firm with major operations in Europe and Latin America, which had invested heavily in advertising, and was troubled by the lack of impact it was having in its various markets. “They felt that something was missing in the several executions they had developed for a specific brand,” says Zaltman. “They

The seven giant metaphors

In some 12,000 in-depth interviews for more than 100 clients in over 30 countries, seven deep metaphors have surfaced with the greatest frequency in every sector and in every country.

People who otherwise differ in cultural background, age, gender, education, occupation, and consumer experiences, share these seven giants. Since they have the most universality among consumers, they also have the most relevance for marketers. They are:

Balance includes the ideas of equilibrium, adjusting, maintaining or offsetting forces, and things as they should be.

Transformation involves changing states or status. Physically we can go from being ‘laid low by a cold’ to being ‘up and about’.

Journey: Consumers talk about many aspects in life as a journey. In fact, we often frame life itself as one big journey, including, for many, an afterlife.

Containers keep things in and keep things out. They can protect us or trap us, and can be positive or negative. They involve physical, psychological, and social states.

Connection encompasses feelings of belonging or exclusion: being kept in or out of the loop. We express psychological ownership when we say my brand, my team, and MySpace.

Resource: We need resources to survive. We would die without food and water. Our family and friends are resources who support us in tough times. Products and services are also important resources.

Control: We need to feel in control of our lives. When people ‘succumb’ to a serious disease, they may feel ‘powerless.’ Or they may vow not to let ‘this thing ruin my life.’

metaphors

decided for the next phase of advertising to scrap their standard approach and go beyond surface level differences among consumers in each country market. In doing so, they discovered that same two deep metaphors shaped how consumers in each region related to the brand. These insights, missing from the prior research, were used to develop a new communications platform which they credit with their largest-ever one year increase in brand sales in both regions.”

So the technique works, but why? “There is now a convincing body of research from several disciplines including neuroscience, linguistics, evolutionary psychology, cognitive science, and anthropology, among others, that most abstract thought is expressed metaphorically,” says Zaltman. “We express our thoughts and feelings about one thing by using our knowledge of or experience with unrelated categories of other things. We use sports analogies or expressions to describe our achievements at work or references to fish or birds to describe the character or actions of other people.

“Moreover, the essential nature of thought involves processes of representation and hence is metaphorical in character. By studying metaphor, which I think of very broadly to include all idiomatic expression, we are able to decode the hidden or secret language of thought and discover what people really mean by what they say or do.”

Zaltman adds that, since deep metaphors, our ‘unconscious viewing lenses’, are the ‘somewhere’ that shape how consumers think and feel and what they say and do, there is no marketing decision that cannot be informed by understanding consumers’ deep metaphors.

He notes, too, that the technique can also be applied to political and social research. “More and more organisations in the not-for-profit sector are discovering that they need to go beyond surface-level thinking to truly understand and build better relationships with their diverse stakeholders,” he says. The approach has been used in the public sector to understand a variety of issues including how policy makers view specific social issues; how executives view corporate social responsibility; how the general public understands poverty; the meaning of freedom, and the nature of conflict in the workplace.

360-degree view

Zaltman is open to other approaches and says that when his techniques are combined with certain other methods, the client is able to obtain a “360-degree view” of the consumer’s mind.

“Sometimes firms will use our results as a basis for informing the content of surveys,” he says. “However, there are other

new techniques and approaches being developed that seem to work well when used hand in hand. ZMET provides insight about the content of thought, while other techniques, which may include surveys, provide valuable insight about the strength of particular thoughts and feelings.”

In fact, says Zaltman, integrating different techniques and methodologies in this way is key. “It is essential that recent knowledge developments in the social and biological sciences be used to design new methods and improve existing approaches,” he concludes. “Many methods do not reflect a really thorough understanding of these advances. But it is not only the responsibility of researchers to understand important insights emerging in several fields. Managers must understand them as well. The same advances that are making improved methodologies available also make it possible to act on the resulting insights more effectively.” ■



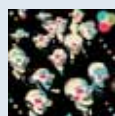
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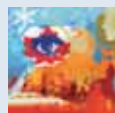
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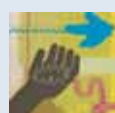
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