

Getting Emotional

Customers buy the products and services that best meet their needs. A successful laundry detergent “gets out greasy dirt” and “leaves clothes smelling fresh”: A shampoo has to “make a lot of lather” and “leave hair looking shiny.” A deodorant soap needs to “stop body odor.” These are the “functional” needs that, in many ways, define both the product category and the “must haves” of any successful product.

But for a wide range of products and services, success in the marketplace requires meeting much more than these functional needs. In order to be successful a product will also have to meet its customers' emotional needs. These emotional needs describe how the product makes the customer feel and are often the basis for both product positioning and advertising. “Makes me feel sexy,” “competent,” “complete,” “manly,” and “comfortable around other people” are a few of the emotional needs that a successful health and beauty aid will have to meet. Although personal care products like shampoos, soaps, and deodorants are obviously promoted with emotional messages, household cleaning products, food products and virtually every other product sold in supermarkets and drug stores needs to deliver on its own unique set of emotional needs.

Our Voice of the Customer work has always identified some needs that feel more emotional than functional. But for many consumer packaged goods, the emotional needs and how the brand is positioned to deliver on those needs can be even more important than what the product really is. For these products, the connections and linkages between the customer's emotional needs and the product's functional characteristics help marketers understand how to create a compelling product and message strategy.

We recently completed a VOCALYST® study in a health and beauty aid category where the explicit objective was to link the emotional needs to the functional product benefits. In the one-on-one interviews that identified customer needs we specifically probed for feelings as well as likes, dislikes, benefits, etc. In our analysis of the interview transcripts, we classified the needs that emerged as “functional” or “emotional.” The most significant modification came in the quantitative, card sort phase of VOCALYST®. Each respondent was given two sets of cards — white cards were printed with the functional needs and pink cards were printed with the emotional needs. Respondents first sorted the white cards with the functional needs into piles or bundles that “went together in their minds.” After picking an exemplar from each pile of functional needs, they then placed each pink card containing an emotional need statement on the pile of functional needs they believed it was most closely related to.

Our analysis painted a clear picture of the linkages between these functional and emotional needs and identified the strengths and weaknesses of existing products. We showed what was important to customers and how well their brand and competitive brands were performing on each dimension of customer perception. In addition, we described the emotional profile of each brand based on customer perceptions of brand performance and the emotional needs that were related to each brand's particular strength. Armed with this information, brand management could develop an advertising and positioning strategy that would address their brand's particular weaknesses and have the correct metrics to evaluate their success.

Our client was “happy” with the results and “confident” about the brand's future direction. Two important emotions.

— Bob Klein

Voice of the Customer in the Courtroom

Market research has come a long way in recent years and surveys touch almost every aspect of our life. The results of public opinion polls are reported as front-page news. Presidential approval ratings seem almost as important as presidential statements. A survey of economists to predict the monthly unemployment report (itself based on a survey) has a billion dollar impact on the stock market. And, increasingly, survey results are influencing a wide range of legal matters.

Until about 50 years ago, survey results were not accepted as evidence in legal proceedings due to the use of sampling techniques – rather than comprehensive questioning of the entire population – and the characterization of survey data as hearsay since one could not cross-examine the survey respondent. In 1975, Federal Rule of Evidence 703 clarified the issue, allowing the use of survey data if it was “of a type reasonably relied upon by experts in the particular field in forming opinions or inferences upon the subject.” This shifted the focus to whether the survey was “conducted in accordance with generally accepted survey principles” and the “results were used in a statistically correct way.”

The range of cases in which survey evidence has been used is surprisingly broad. Trademark issues are particularly appropriate for survey evidence. The likelihood of customer confusion due to the similarity of names, colors, product or package shape, and other factors can be clearly addressed with a well-designed survey. In fact, surveys are so common in these types of cases, that the lack of a survey can cast a negative inference on the party's position. The Supreme Court recently went on record to suggest a survey as a means of proving damages in a case involving possible confusion between the Victoria's Secret™ name and an adult novelty shop in Kentucky.

Misleading advertising claims can be supported by surveys showing how customers interpret an ad, regardless of whether the content is technically true. Surveys are also used to establish damages in patent infringement cases and in cases where the actions of one party impacted another's business. What would customers have done “but for” the alleged injurious actions?

Class action cases presume that the “class” is relatively homogeneous, that common questions “predominate over any questions affecting only individual members,” and that the claims of the representative parties are typical of the class. Surveys are increasingly being used to refute these claims of “commonality” and “typicality.”

Even VOCALYST® and the Voice of the Customer are having their day in court. Antitrust lawsuits often allege that a specific unfair trade practice is not only harming a competitor, but harming customers as well. A question to consider in these cases is whether the defendant was in fact acting in an anti-competitive manner or just giving customers what they wanted? If customers benefit, yet competitors are harmed, is it a violation of the law or a reflection of good product development and marketing? This kind of defense requires strong evidence regarding what customers want and need – essentially the Voice of the Customer. By adhering to the standards for legal research, and clearly documenting every aspect of the surveys conducted, the same information used to guide product development decisions is ideal for addressing a variety of core issues in the courtroom.

— *Bob Klein*

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