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EXPERT WITNESS PROFILE

Marketing professor and editorial leader specializing in **consumer perception, branding, digital platforms, and pricing**. Provide expert services in **Lanham Act litigation and advertising disputes**, including survey design, conjoint analysis, and rebuttal of opposing experts. Extensive record of publications in top journals and frequent national media commentary.

EXPERTISE AREAS

- Likelihood-of-confusion surveys (Eveready, Squirt, trade dress)
- Secondary meaning & distinctiveness
- Deception / claim-substantiation surveys
- Conjoint & choice-based damages apportionment
- Survey rebuttals & Daubert critiques
- Influencer marketing, digital advertising, multichannel retail

ACADEMIC APPOINTMENTS

2026 – Present, **Professor of Marketing & Dr. Ajay Menon Professor in Business,** Colorado State University
2019 – 2026, **Associate Professor of Marketing & Dr. Ajay Menon Professor in Business,** Colorado State University
2010 – 2019, **Assistant Professor of Marketing**, University of Washington

EDITORIAL LEADERSHIP

Associate Editor, *Journal of Marketing*, 2024-present
Area Editor, *Journal of the Academy of Marketing Science*, 2022-present
Editorial Review Board, *Journal of Marketing Research*, 2025-Present*, Journal of Retailing,* 2025-Present

EDUCATION

Columbia Business School, Columbia University, New York, NY
Ph.D. in Quantitative Marketing, 2005 - 2011

Rutgers Honors College, Rutgers University, New Brunswick, NJ
B.A. in Economics & B.S. in Mathematical Statistics (Summa Cum Laude), 2001 - 2004

SELECT PUBLICATIONS (Litigation-relevant discussion in bullets)

1. **Zhang, Jonathan Z**. (2025). How Direct Mail Delivers in the Age of Digital Marketing. ***MIT Sloan Management Review.*** *Fall 2025 issue.*
    - Shows consumer response to analog marketing stimuli; applicable to survey design realism (stimuli selection).

2. Taylor, Wayne & **Jonathan Z. Zhang** (2025) "CRM with Reference-Dependent Sensitivities: Evidence from the Casino Industry. ***Quantitative Marketing and Economics***, *Forthcoming*
    - Rigorous field data analysis; evidences methodological depth and ability to translate consumer behavior into quantifiable metrics.

3. Leung, Fine, Flora Gu, Yiwei Li, **Jonathan Z. Zhang,** & Robert Palmatier (2022). Influencer marketing effectiveness. ***Journal of Marketing,*** *86*(6), 93-115.
    - Examines consumer response and brand lift from influencer campaigns — directly applicable to endorsement, deception, and disclosure cases.
    - Featured in *CSU SOURCE*, *UW News, Adweek, US Chamber of Commerce, RetailWire*
    - *JM Buzz Podcast*

4. Mu, Jifeng, **Jonathan Z. Zhang,** Abhishek Borah, & Jiayin Qi (2022). Creative appeals in firm generated content and product performance. ***Information Systems Research,*** *33*(1), 18-42
    - Studies persuasive messaging; useful for claim-substantiation and deception disputes.

5. **Zhang, Jonathan Z**., C.W. Chang, & Scott Neslin (2022). How physical stores enhance customer value: the importance of product inspection depth. ***Journal of Marketing,*** *86*(2), 166-185.
    - Consumer perception of product inspection and retail experiences — often raised in trade dress and channel confusion disputes.
    - Featured in *Columbia Business School Ideas and Insights* - "Rebirth of Retail"
    - Featured in *Bloomberg Professional Services, Bloomberg Businessweek, Bloomberg Businessweek China Edition*, *Retail Dive, CSU SOURCE*
    - *MSI Insights*

6. Mu, Jifeng & **Jonathan Z. Zhang** (2021). Seller marketing capability, brand reputation, and consumer journeys on e-commerce platforms. ***Journal of the Academy of Marketing Science,*** *49*(5), 994-1020
    - Online confusion & diversion: Shows empirically how brand reputation and marketing tactics shape consumer click-through, search, and purchase behavior. This is relevant in trademark infringement, false advertising, and unfair competition cases where attorneys argue that one seller diverts customers from another.
    - Reputation evidence**:** Demonstrates how brand reputation operates as a consumer shortcut in digital marketplaces — supporting arguments about *secondary meaning*, brand dilution, or damages from a competitor's misrepresentation.

7. **Zhang, Jonathan Z**. & C.W. Chang (2021). Consumer dynamics: theories, methods, and emerging directions. ***Journal of the Academy of Marketing Science***, *49*(1), 166-196
    - This review and agenda piece literally provides the *field's theoretical and methodological roadmap*: The authority strengthens Daubert admissibility.
    - Highlights how consumer responses change over time — which matters in false advertising, trademark dilution, and secondary meaning cases where attorneys must argue harm develops (or dissipates) longitudinally.

8. **Zhang, Jonathan Z**. (2019). Dynamic customer interdependence. ***Journal of the Academy of Marketing Science***, *47*(4), 723-746.
    - Demonstrates that consumer behavior cannot always be treated as independent — one deceptive ad, misleading claim, or infringing product can trigger cascading effects across a market. This supports damage theories that account for *indirect influence* and *network spillovers*.

9. **Zhang, Jonathan Z**., George Watson, Robert Palmatier, & Rajiv Dant (2016). Dynamic relationship marketing. ***Journal of Marketing***, *80*(5), 53-75.
    - Accessible evidence of consumer relationship dynamics; relevant to secondary meaning and long-term brand distinctiveness.
    - 2023, Louis W. Stern Award

10. **Zhang, Jonathan Z**., Oded Netzer, & Asim Ansari (2014). Dynamic targeted pricing in B2B relationships. ***Marketing Science*****,** *33*(3), 317-337.
    - Quantitative modeling of pricing and discrimination — informs damages and apportionment analyses.
    - Lead Article
    - 2014 Finalist, John D.C. Little Award
    - 2014, 2015 Finalist, Frank Bass Award
    - Shankar-Spiegel Dissertation Award (Direct Marketing Education Foundation).

- Featured by *the Associated Press*

SELECTED MEDIA & INDUSTRY IMPACT

- Quoted/interviewed in **The Atlantic, Newsweek, NPR Marketplace, Associated Press, Bloomberg Businessweek, Adweek, Retail Dive**
- Keynote speaker, **National Postal Forum 2025** – "The Tactile Advantage: Revolutionizing Marketing with Direct Mail"

EXPERT SERVICES OFFERED

- Design & execution of Lanham Act surveys (Eveready, Squirt, secondary meaning, deception)
- Conjoint/choice modeling for valuation & damages
- Critical review & rebuttal of opposing expert surveys (Daubert)
- Deposition & trial testimony
- Bilingual (English, Mandarin Chinese); nationwide availability