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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

2019 – Present, **Dr. Ajay Menon Professor in Business and Associate Professor of Marketing**, 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

Former Editorial Review Board, *Journal of Marketing*, *JAMS*

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