Carousel Creative

Customer Research Canvas

The starting point for creative strategy that truly resonates.

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INTRODUCTION

Start Here

Great creative doesn't start with a brief. It starts with a customer.

Before you write a single hook or concept a single ad, you need to understand who you're actually talking to — not just their age and location, but what they want, what's holding them back, and the exact words they use to describe their own life.

The Customer Research Canvas is the framework I use at the start of every client engagement at Carousel Creative. It's the foundation that makes everything downstream — angles, hooks, scripts, static concepts — sharper, faster, and more likely to actually work.

Work through each section using the AI prompt provided. You don't need to have all the answers before you start. The process of filling this out will surface insights you didn't know you were missing.

YOUR AI PROMPT

Use this prompt with any AI tool to research and fill out your Canvas automatically.

Access the Canvas Prompt

SECTION 01

Understanding Your Customer

Before you can write an ad that resonates, you need to build a genuine picture of the person you're selling to. This isn't about creating a fictional marketing persona. It's about grounding your creative in who actually buys your product, and why.

Demographics

Demographics are your starting point: the basic factual layer that defines who your customer is on paper. Think age range, gender, location, household income, family status, and occupation. On their own, demographics don't tell you much. But they give you critical context for everything that follows, and they help you calibrate your creative for the right platform, format, and tone.

Psychographics

Psychographics go deeper, and for creative strategy, they tend to be far more powerful than demographics alone. This is where you capture how your customer thinks, what they value, how they spend their time, and what kind of person they see themselves as or aspire to be. What are their priorities? What do they read or watch? What communities do they belong to? Psychographics are what make the difference between an ad that feels generic and one that makes someone stop and think: this brand gets me.

Pain Points

Pain points are the friction, frustration, or unmet needs that make your customer open to a new solution. These can be functional (something doesn't work the way it should), emotional (they feel embarrassed, overwhelmed, or stuck), or situational (a recurring circumstance that creates a problem). The more specifically you can name the pain in the customer's own terms, the more your creative will land.

Emotional Motivators

Emotional motivators are the underlying psychological drivers behind why someone really buys. This section draws from Will Leach's framework in Marketing to Mindstates, which identifies the core motivational states that influence consumer decision-making. These go beyond surface-level desires to the deeper emotional needs your product is actually fulfilling. Understanding which motivational state your customer is in at the moment of purchase is what separates emotionally resonant creative from creative that just describes a product.

Achievement	The drive to accomplish something meaningful and feel a sense of progress
Autonomy	The need to feel in control and make independent choices
Belonging	The desire to feel connected to and accepted by others
Competence	The need to feel skilled, knowledgeable, and capable in what you do
Empowerment	The desire to feel strong and capable of taking on challenges
Engagement	The drive to feel stimulated, absorbed, and fully present
Esteem	The need to feel respected, valued, and seen positively by others
Nurturance	The desire to support others' growth and wellbeing
Security	The motivation to protect oneself or loved ones from harm or uncertainty

Identify which three motivational states are most active for your customer in the context of your product. These will become the emotional foundation of your strongest creative angles.

SECTION 02

Understanding the Decision

Knowing your customer is only half the picture. The other half is understanding the specific decision they're making when they choose to buy. This section maps the mechanics of that decision so your ads can meet them at exactly the right moment.

Jobs to Be Done (JTBD)

The Jobs to Be Done framework asks a simple but powerful question: what is your customer hiring your product to do? Every purchase is progress toward a goal, whether functional, social, or emotional. When you understand the job your product is being hired for, you can build creative around the outcome your customer is actually seeking, rather than the features your product has.

Triggers

A trigger is the specific moment, event, or shift in circumstance that moves someone from vaguely aware of a problem to actively looking for a solution. Something has to happen to make a person start searching. Identifying your customer's most common triggers lets you build creative that speaks to people right at the point they become ready to buy, which is when your message is most powerful.

Objections

Objections are the reasons someone might hesitate, delay, or scroll past. Price, skepticism, uncertainty about fit, a bad experience with a competitor: these are all objections your creative needs to anticipate and address. The best-performing ads don't avoid objections. They acknowledge them and resolve them before the customer even has to ask.

SECTION 03

Understanding the Context

Your customer doesn't exist in a vacuum. They have options, they have habits, and they have specific moments in their life where your product does and doesn't fit. This section helps you understand the landscape your brand is competing in and where you actually belong in it.

Alternatives

Before your product, what was your customer doing? Alternatives aren't just your competitors. They're whatever solution (or non-solution) the customer was relying on before. This could be a DIY workaround, a completely different category of product, or simply doing nothing. Understanding alternatives tells you what you're actually up against and how to position your product as the obvious upgrade.

Competitors

Knowing who else your customer is seriously considering is essential context for creative strategy. What are those brands saying? What are they promising? Where are the gaps? This isn't about copying or tearing down competitors. It's about understanding the conversation already happening in your customer's head so you can enter it with something sharper and more distinct.

Use Cases

A use case is a specific situation or context in which someone reaches for your product — and a single customer can have many of them. This is different from who your customer is. It's about the distinct moments in their life where your product becomes relevant. The same person might use your product for completely different reasons depending on the day, the environment, or what they're trying to get done. Mapping these moments out gives you a library of relatable, concrete scenarios to build creative around — and often reveals angles that are far more specific and compelling than anything a broad audience description would surface.

SECTION 04

Understanding Their Voice

It doesn't matter how well you understand your customer if you're speaking to them in language that doesn't feel like theirs. The goal here is to get out of your own head and start thinking in your customer's words.

Customer Language

Customer language is the specific vocabulary your buyers use when they talk about their problem, their goals, and products like yours. This means the phrases they use in reviews, the questions they ask in forums, and the way they describe the before and the after. Great hooks, headlines, and scripts are almost always lifted directly from real customer language, because when someone hears their own words reflected back at them, it creates instant recognition and trust. Collect this language everywhere: reviews, DMs, comment sections, Reddit threads, post-purchase surveys.

CONCLUSION

What Comes Next

You now have a complete picture of your customer: who they are, why they buy, what stops them, and how they talk about it.

This Canvas becomes the reference document for everything that follows: angle development, hook writing, script briefs, and creative testing. Come back to it whenever you're stuck. The best creative ideas are almost always hiding somewhere in here.

If you used the AI prompt to fill this out, review the output with a critical eye. Add anything the AI missed, correct anything that feels off, and make notes on anything you want to explore further. The more honest and specific this document is, the more your creative will reflect the real people you're trying to reach.

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