

In Goal Pursuit, I Think Flexibility Is the Best Choice for Me but Not for You

Journal of Marketing Research
 2023, Vol. 60(5) 1008-1026
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 DOI: 10.1177/00222437221143755
journals.sagepub.com/home/mrj



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Abstract

Consumers regularly attempt to improve themselves. This research examines how consumers think about flexibility during goal pursuit, for themselves and others. Flexibility involves leaving details of a plan, such as when to go to the gym or what to eat, open or easy to change, whereas rigid plans determine those details in advance. Here, several studies across a variety of goals show that people usually choose rigid plans for others. However, people are more likely to opt for some flexibility in their own plans. This occurs because many people believe flexible plans are less effective, but also more appealing (or less unpleasant), than rigid ones. Choosing for oneself, versus for someone else, increases the degree to which one follows one's heart (i.e., relies on feelings and desires), which makes people more likely to choose the more appealing option, flexibility. Asking people to "follow their heads" instead (i.e., rely on logic and reason) causes people to choose similar (rigid) plans for themselves and others. Finally, the authors use this framework to increase preferences for rigid fitness plans in a field experiment. This research provides insight into the psychology of flexibility and how to nudge consumers to set themselves up for success.

Keywords

decision making, self/other differences, flexibility, follow your heart

People regularly set intentions to improve their physical, fiscal, mental, or spiritual well-being. Over 35% of Americans set a New Year's resolution, such as exercising more, eating healthier, or saving more money (Lohr 2019; Sanders 2023). And they spend money to plan for their resolutions. The self-improvement market in the United States is worth \$10 billion and includes apps to plan and track progress, advice books, and personal coaching, among other products (LaRosa 2018). Given how common self-improvement resolutions are and how much money is spent on their pursuit, it is important to understand how people plan to achieve these goals.

One key decision is how much flexibility a plan should have. Flexible plans allow consumers to make decisions about their goal-directed actions as they go. With flexibility, consumers can "play it by ear" as they choose what to save money on, when to go to gym classes, and so forth. Other plans are more rigid and structured: details like what to save money on or when to go to gym classes are committed to in advance. For example, consider a consumer using an app to track and set goals about their food intake. The consumer could use the app to make a flexible plan, setting a goal to eat 2,000 calories per day but leaving open exactly what they will eat for each meal. Or the consumer could make a more rigid plan in the app, setting a goal to eat 2,000 calories a day and planning ahead exactly what meals they will eat on which days.

Knowing what consumers think about having flexibility in their goal plans, and whether they prefer flexibility or rigidity, can help consumers achieve their goals and help companies design and advertise their products.

Further, consumers pursue these resolutions and goals in a social context, which may affect how they think about flexibility. For one, giving and receiving advice on self-improvement is a common practice. People discuss and share tips on goals to eat healthy, get good grades, and save money. They trade advice not only in person but also increasingly through social media and self-improvement apps. For example, on Facebook, people can join groups with others who are pursuing the same goal. On self-improvement apps like MyFitnessPal and Smoke Free, people can use message boards or chat rooms to exchange advice on how to achieve their goals. Moreover, people not only nudge or advise other people but sometimes actually make decisions for them. This happens in professional contexts: coaches in the \$1 billion personal coaching industry regularly make decisions for customers on how to achieve

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success (LaRosa 2018), and employers determine how much structure should be incorporated in employees' plans to achieve their work goals. But it also happens in personal contexts: someone might choose how and when to work out on behalf of an exercise buddy, and some couples have one spouse assume the majority of their financial decision-making responsibilities, thereby regularly making decisions on behalf of the other spouse about how to spend and save (Ward and Lynch 2019). And, of course, marketers make decisions for others when designing and advertising products that they think other customers will find appealing and want to purchase. Given this, do people think being flexible or being rigid is the best way to pursue a goal, and does their thinking depend on whether they focus on their own situation or someone else's?

In the present research, we develop a framework for understanding how consumers think about flexible versus rigid plans, for themselves and for others. We show that consumers typically choose rigid plans for others, but people are more likely to opt for some flexibility in their own plans. We also examine why this happens. Many consumers think flexibility is less effective, but more appealing (or at least less unpleasant), than rigidity. A self/other asymmetry occurs because deciding for oneself (as opposed to for someone else) increases the degree to which someone "follows their heart"—that is, relies on their feelings, emotions, and desires—which increases the likelihood of choosing the more appealing flexibility. Interestingly, prior research suggests that consumers are usually more successful when they use rigid, detailed plans (for reviews, see Gollwitzer and Sheeran [2006, 2009]; though for boundary conditions, see Bayuk, Janiszewski, and LeBoeuf [2010], Beshears et al. [2021], Dalton and Spiller [2012], and Townsend and Liu [2012]), meaning that consumers appear to frequently choose less effective plans for themselves than for others. But our research also suggests solutions to this dilemma, which we test in a number of experiments, including a field experiment with a fitness company.

Flexibility and Rigidity

Plans can be broadly categorized on a continuum from flexible to rigid (e.g., Ariely and Wertenbroch 2002; Jin, Huang, and Zhang 2013; Marien, Aarts, and Custers 2012; Rai et al. 2022). Flexible plans are more easily changed or adjusted than rigid plans. In goal pursuit, the most rigid plans are a fixed series of goal-directed actions to be executed in a prespecified situation, with meaningful costs for deviation from the plan. For example, a rigid exercise plan would be to agree to meet a friend at the gym every Monday morning at 6:30, stretch, and then attend a Zumba class. It specifies the actions (stretching and Zumba), the order (stretch first, Zumba second), and the situations (day and time). Furthermore, accountability to a friend imposes a cost to deviating from the plan (the embarrassment of canceling on your friend), also making the plan more rigid. Flexible plans leave open the option to choose the goal-directed actions according to the situations and costs that arise. A plan can incorporate flexibility by

leaving open the goal-directed actions, the order of actions, or the situations during which the actions will be executed. In the prior example, a person with a more flexible plan might commit to exercise once a week, but decide the goal-directed actions (e.g., which exercise class to attend), the order of actions (e.g., whether to stretch before or after class), and/or the situations (e.g., what day and time to go to class) as they go. A plan can also be made more flexible by reducing the costs of changing one's mind (e.g., no accountability to a friend), so that adjustments to the plan can then be easily made.

Prior research has examined the consequences of incorporating rigidity and structure in a goal plan. Rigid plans can be helpful for a number of reasons, some of which have been studied in the literature on implementation planning. Rigid plans are more detailed and concrete, so as people think through the steps of the plan ahead of time, those steps then can become automatic and accessible when needed (Gollwitzer and Sheeran 2009). People who form "if-then" implementation intentions to follow through with a goal (e.g., "I will stretch and then go to a Zumba class on Monday at 6:30 a.m.") link a specific situation ("if it is Monday at 6:30 a.m.") to a goal-directed action ("then I will stretch and then go to Zumba class"). Over time, learning such associations should lead to the formation of and leverage the benefits of good goal-directed habits, such as the habit of stretching at the gym before class.

Although this prior research has examined the consequences of rigid versus flexible plans, less research has been devoted to consumers' beliefs about and preferences for rigid and flexible plans. What are consumers' perceptions of rigidity versus flexibility, and how do these perceptions affect their choices of rigid versus flexible plans?

In the present research, we propose that many consumers believe that a rigid plan is more effective, but also more unpleasant (that is, less appealing), than a flexible plan. People may view rigid plans as more effective for a number of reasons. They can help a person stay on track to a goal by making clear what the next steps are. They could also lead to the formation of goal-directed habits. But why might people view rigid plans as more unpleasant? Consider a (rigid) plan to exercise on Mondays at 6:30 a.m. If someone has a restless Sunday night, then sticking to the plan early Monday morning, when they are tired, might be pretty unpleasant. Now consider the same situation, but with a more flexible plan to participate in a class at the gym once a week. In this situation, a person can move the Monday morning session to another day and still adhere successfully to their plan. There is some evidence that suggests consumers experience this type of efficacy/appeal trade-off. For example, participants completing a proofreading task were more effective (in terms of objective performance) when they could make rigid precommitments (here, impose deadlines), but also liked the experience less (Ariely and Wertenbroch 2002). We focus on self-improvement goals, such as exercising, learning, eating healthy, or saving money, where this type of conflict between pleasantness and effectiveness is likely. (Note that we do not

study goals regarding pure leisure activities, like a plan to eat ice cream, which may not prompt the same internal conflict between perceived efficacy and pleasantness. We return to this in the “General Discussion” section.)

In a pilot study, we tested whether consumers perceive this type of trade-off between flexible and rigid plans (see the Open Science Framework [OSF] link in the “Research Overview” section for materials and data). We asked participants ($N = 100$) on Prolific to choose between a rigid plan (“a plan where I have decided the details ahead of time”) and a flexible plan (“a plan where I decide the details as I go”) for the following items: “Which plan is more **effective** for achieving your goal?” (81% said the rigid plan); “Which plan is best for **staying on track** to achieving your goal?” (84% said the rigid plan); “Which plan is more **unpleasant** to stick to?” (56% said the rigid plan). Thus, people agreed that rigidity was more effective at keeping them on track. However, about half of the participants also thought rigidity was the more unpleasant approach.

A different way of examining the data is looking at how many consumers perceive a trade-off between flexibility and rigidity. Many consumers (40%) perceived a trade-off, such that they viewed rigidity as more effective but also more unpleasant. In contrast, only 3% of consumers reported that flexibility was the more effective yet more unpleasant option. This pilot data indicates that many consumers thus face a dilemma: they can opt for the plan that they believe is more likely to work or the plan that sounds less unpleasant. How do consumers negotiate this trade-off?

Following Your Head or Following Your Heart

Trade-offs between an option you think is effective and logical and an option that feels good are common enough that there is language describing how people think about navigating them. Some researchers have used the phrases “following your heart” and “following your head” to refer to the idea of relying on one’s feelings, emotions, and desires versus relying on logical, dispassionate reason (Avnet, Pham, and Stephen 2012; Hsee et al. 2015; Shiv and Fedorikhin 1999; Woolley and Risen 2018). We likewise use the language of “following your heart” and “following your head” to describe consumers’ thought processes about the trade-off between flexibility and rigidity throughout the article. We do so for two reasons. First, we believe this language is familiar to consumers and captures the psychology and the tension that many consumers experience during goal planning. For example, the Oxford English Dictionary explains that “to follow one’s heart” is to “act in accordance with one’s deepest feelings or desires, esp. when this is in opposition to what is rational or conventional” (OED Online 2023). This common usage allows us to ask and instruct participants directly about these processes throughout our research. Second, we believe this language most closely captures the psychological differences in how people weigh feelings versus reason in judgment. On the one hand, a set of evaluations that might factor into a decision are one’s feelings

and emotions about an option. For example, one might consider the answer to questions like “How do I feel about it?” and “Do I think it will make me feel good?” (Pham 1998; Schwarz and Clore 1988). If one follows one’s heart, one gives more weight (relative to when one follows one’s head) to these considerations about feelings and desires. On the other hand, another set of evaluations that might factor into one’s decision are inferences made by dispassionate reasoning, such as beliefs about how effective the options are. If one follows one’s head, one gives more weight (relative to when one follows one’s heart) to dispassionate inferences. Thus, following one’s heart versus following one’s head represents a continuum, from placing all the relative weight on feelings (vs. reason) to placing all the relative weight on reason (vs. feelings). In the middle of this continuum, both sets of considerations—feelings and reason—are at play.

We expect that when planning how to pursue a goal, people are by default inclined to follow their heads, favoring dispassionate logic over feelings and emotion. After all, planning typically requires logic and reason. This would lead people to choose a rigid plan, which is perceived to be more effective and better for keeping someone on track to their goal. However, we also expect that people are not completely immune to considerations of “the heart” (how something feels, what one desires) even when making a plan, and the more a person “follows their heart,” the more likely they are to choose flexible plans. When people follow their hearts, they prioritize their desires and what feels good, and flexibility has the advantage of feeling good insofar as it is viewed as less unpleasant.

To summarize, many people believe that flexibility is less effective for staying on track to a goal, while also finding it more appealing than rigidity. This leads us to expect that the more heavily people weigh how something feels in their choices, the more likely they will be to choose flexibility. Importantly, however, feelings and desires (vs. dispassionate logic) are likely to play a smaller role when choosing for someone else than when choosing for oneself.

Self/Other Differences

Prior literature suggests that thinking about oneself versus someone else changes the extent to which one follows one’s heart versus follows one’s head. Specifically, in goal pursuit, people might follow their heads when choosing on behalf of others, but be less immune to considerations of the heart when choosing on their own behalf. For example, people avoid unpleasant health information when choosing for themselves as opposed to when choosing on behalf of a friend, because emotional wants (here, wants to avoid unpleasant information) loom larger for themselves than for others (Woolley and Risen 2021, Study 3). People might follow their hearts more for themselves than for others for a few reasons. First, people are likely to give greater weight to their own gut-level, emotional reactions simply because those reactions are more salient, and when people pay more attention to something they also place more importance on it (MacKenzie 1986). In

contrast, distancing oneself from one's own perspective, by thinking of oneself as an observer or "fly on the wall," causes emotional reactions to loom less large (Ayduk and Kross 2010).

Second, even when dread, worry, or other feelings are equally salient, people likely still give those feelings less weight in choosing for someone else. Introspective reactions, like feelings and desires, are seen as especially informative about oneself and are given weight in self-judgment, but are given less weight or even ignored in judgments of others (e.g., Andersen and Ross 1984; Pronin, Gilovich, and Ross 2004). Related to goal pursuit, people give more weight to aspirations, intentions, and desires when making predictions about their own goals versus someone else's (Helzer and Dunning 2012). While a consumer might understand that other consumers experience the pull of flexibility, they are less likely to think that pull should matter when making plans for someone else.

Our Predictions

Putting together these ideas about flexibility, self/other differences, and following one's heart versus following one's head yields a number of predictions. To start, consumers should follow their hearts (vs. their heads) more for themselves than for others. Following one's heart should increase choice of (appealing) flexible plans over (effective) rigid plans. Thus, people should choose flexibility over rigidity more often for themselves than for others. Formally,

H₁: Choosing for oneself, as opposed to choosing for someone else, increases the likelihood of choosing a flexible plan over a rigid plan.

H₂: Thinking about one's own plans (vs. others' plans) makes one more likely to follow one's heart (vs. follow one's head), which predicts whether one chooses a flexible plan over a rigid plan.

If self/other asymmetries in preference for flexibility occur because of the way in which people think about the choice, then changing how people think about the choice should also change their preference for flexibility. We theorize that people are more likely to choose flexibility for themselves than for others because they follow their hearts (vs. their heads) more when choosing for themselves than for others. In other words, people tend to follow their heads when choosing for others, and regularly choose rigidity. When choosing for themselves, though, people follow their heads less than when choosing for others, and therefore choose rigidity less often than when choosing for others. This further suggests that if people are encouraged to follow their heads more, they should shift toward rigidity for themselves, and the difference between choices for the self and for others should be reduced. Formally,

H₃: Instructing a person to "follow their head" attenuates the self/other difference in choosing flexible plans over rigid plans.

Our framework thus far has focused on when people choose for others in the context of making recommendations or decisions on behalf of others. In these cases, we predicted that people follow their heads more for choices for others than for themselves, which makes them more likely to choose rigid plans for those others than for themselves. However, there may be times where people are more inclined to choose for others by following their hearts. One such occasion is when a gift giver is choosing an item to give someone else as a gift. Many calendars and planners are sold during the holidays, with the New Year and its resolutions around the corner. But whether a planner is purchased as a holiday gift might affect whether the buyer chooses a flexible planner, in which the recipient can broadly sketch out tasks and priorities, or a rigid planner, in which the recipient must plot out structured schedules and to-do lists. Anecdotally, people try to give gifts that come "from the heart." Gift givers tend to prioritize what a person wants over what they need (Kim, Williams, and Rosenzweig 2023; Liu, Dallas, and Fitzsimons 2019). Moreover, people aim to maximize the recipient's positive emotional reaction on opening the gift (sometimes even if it means forgoing their overall satisfaction with the gift; Yang and Urminsky 2018). This suggests that gift giving increases the degree to which people follow their hearts and choose gifts that recipients want and that will make them feel good.

We therefore hypothesize that the purpose of the choice moderates our effect: the difference between choosing for the self and choosing for another will be smaller when people are choosing a *gift* for another. Thus, choosing a gift for someone else (rather than choosing on their behalf more generally) makes choosing a flexible option more likely. More formally,

H₄: Choosing a gift for someone else, as opposed to making a recommendation or choice on someone's behalf, increases the likelihood of choosing a flexible plan over a rigid plan.

Gift giving represents one case where we end up choosing for others as we do for ourselves. However, there should also be cases where we choose for ourselves in the same way as we choose for others. Following one's head causes people to put more weight on dispassionate, logical considerations, and one such consideration is whether a plan helps a person stay on track. (Indeed, a pilot study confirmed that following one's head is connected to thinking about staying on track. One hundred Prolific participants answered the question "Are you more likely to think about which plan helps you **stay on track** to your goal when you follow your head or when you follow your heart?"; 85% indicated that it was "more likely when I follow my head.") Thus, we expect that while people who are choosing for others are already more likely to follow their heads and give weight to rigidity's advantage for staying on track, having everyone put greater emphasis on staying on track should reduce the self/other asymmetry, such that people choose more rigid plans for others and for themselves.

We test this in our final studies. We examine the effects of drawing people's attention to the idea that rigid plans help one stay on track to one's goal. Increasing attention to an attribute increases the importance people place on that attribute (MacKenzie 1986). Therefore, we expect that when the idea of using a rigid plan to stay on track is made salient, it will get more weight in decision making (as it does when one follows one's head), leading people to choose rigid plans both for others and for themselves. Formally,

H_{5a}: Drawing attention to which plan helps people stay on track attenuates the self/other difference in choosing flexibility over rigidity.

H_{5b}: Drawing attention to staying on track with a rigid plan increases the choice of rigidity (vs. flexibility) for the self.

Research Overview

Across our studies, we examine when and why people choose flexibility for themselves, and for others. Study 1 (testing H₁) examines whether people choose flexible plans for themselves more often than they choose flexible plans for others. In Study 1a, in the week before final exams, students chose flexible study schedules for themselves, but they recommended rigid study schedules for other students. In Studies 1b and 1c, people made actual choices and wrote actual plans to pursue their goals. For students writing plans for the next day (Study 1b) and people writing plans for their New Year's resolutions (Study 1c), participants chose to make flexible plans for themselves more often than they assigned others to make flexible plans. Studies 2 and 3 begin to examine the proposed mechanism. In Study 2 (testing H₂), people who chose for themselves (vs. someone else) followed their hearts (vs. their heads) more, and this mediated the effect of self/other on choice of flexibility. In Study 3 (testing H₃), instructing people to follow their heads moderated the self/other effect and caused everyone to choose similarly rigid plans. Studies 4 and 5 test boundary conditions predicted by our theory. In Study 4 (testing H₄), people were more likely to make flexible choices for others in a gift-giving context. This reduced the self/other gap by making choices for others look similar to choices for the self. In Study 5 (testing H₅), people were more likely to make rigid choices for themselves when a logical, dispassionate consideration was made salient: here, the possibility of rigid plans helping them "stay on track." This reduced the self/other gap by making choices for the self look similar to choices for others. Moreover, this "stay on track" nudge shifted consumers' preferences for rigidity in a field study with a fitness company. All studies were preregistered (except for pretests and pilot studies). Materials, data, analysis scripts, and preregistrations for all studies in this article are available on the OSF website (<https://osf.io/p6sye/>).

Study 1: Self/Other Differences in Choosing Flexibility

Study 1 serves as an initial test of whether people choose flexibility more often for themselves than for others (H₁). Study 1a had students think about study plans for the upcoming final exam period, and they either reported whether they would choose flexibility or rigidity for themselves or indicated which they would recommend to others. In Studies 1b and 1c, people made actual choices between flexible and rigid planning tools on behalf of themselves or someone else. In Study 1b, students made choices about how to plan for their next day, and in Study 1c, people made choices about how to plan to pursue their current New Year's resolutions.

Study 1a Methods

Participants. Students (N=149) completed a short online survey in exchange for course credit. The survey was about studying for final exams. The data were collected during the last week of classes, when students were preparing for their final exams for the semester.

Procedure. Students were randomly assigned to complete a survey either about their own study plans ("Self" condition) or about another student's study plans ("Other" condition). In the "Self" condition, students read the following:

We are interested in how **YOU** make study plans for the final exam period. There are two broad ways you can plan your studying:

- A. You could commit to studying for a certain length of time or number of chapters/lectures/topics, and **decide ahead of time** exactly when you will study (for example: commit to study 10am–2pm and 6pm–10pm Tuesday, 3pm–7pm Wednesday, et cetera)
- B. You could commit to studying for a certain length of time or number of chapters/lectures/topics, and **decide as you go** exactly when you will study (for example: decide on a day-by-day basis whether you study in the morning, afternoon, evening, or some combination)

If you sat down right now to plan out your studying for finals, which option would you choose?

In the "Other" condition, students read the following:

We are interested in how you would recommend **ANOTHER STUDENT** (who is also taking this survey) make study plans for the final exam period. There are two broad ways someone can plan their studying:

- A. They could commit to studying for a certain length of time or number of chapters/lectures/topics, and **decide ahead of time** exactly when they will study (for example: commit to study 10am–2pm and 6pm–10pm Tuesday, 3pm–7pm Wednesday, et cetera)

- B. They could commit to studying for a certain length of time or number of chapters/lectures/topics, and **decide as they go** exactly when they will study (for example: decide on a day-by-day basis whether they study in the morning, afternoon, evening, or some combination)

If **ANOTHER STUDENT** were about to sit down right now to plan out their studying for finals, which option would you recommend to them?

The key dependent variable was which option was chosen. Although both study plan options involve committing to studying for a certain length of time or number of chapters/lectures, Option B is more flexible because the details of when to study can be decided each day. We expected participants to choose Option B (the flexible plan) for themselves more often than for others.

Finally, all participants (regardless of their experimental condition) answered three exploratory questions on the next page of the survey, in a randomized order. First, they answered how frequently they actually planned ahead their studying for final exams (“never,” “rarely,” “sometimes,” “often,” or “always”). Second, they indicated how important studying well for exams was to them (1 = “not at all important,” and 5 = “extremely important”). Third, they indicated how important studying well for exams was to another student (1 = “not at all important,” and 5 = “extremely important”).

Study 1a Results

As predicted in H_1 , students chose the flexible option for themselves more frequently (57.1%) than they recommended it for another student (32.3%; $\chi^2(1) = 9.09, p = .003$).

We also examined our exploratory measures in a series of analyses that were not preregistered. Students indicated that they frequently planned out their studying and viewed it as important. In terms of frequency, most students said they regularly planned ahead their studying (16.8% said “always,” 35.6% said “often,” 36.2% said “sometimes,” 10.1% said “rarely,” and 1.3% said “never”). In terms of importance, students rated studying well for exams as highly important ($M = 3.88, SD = .82$, on a five-point scale).

Finally, we compared the rated importance of one’s own study goals and another student’s study goals. One possibility is that participants chose rigid study plans for other students because they believed studying well was a more important goal to other students. However, this did not seem to be the case. In a paired-samples t-test on importance ratings, students rated the importance of their own study goals ($M = 3.88, SD = .82$) as similar to the importance of another student’s study goals ($M = 3.97, SD = .76; t(148) = 1.43, p = .154, d = .12$).

Study 1b Methods

Participants. Students ($N = 214$) completed a short survey in a university laboratory in exchange for course credit.

Procedure. In this survey, students made real choices for themselves or for someone else about how to plan a day’s worth of tasks. Students chose for themselves (“Self” condition) or for another student (“Other” condition), randomly assigned. In the “Self” condition, participants chose between two layouts for a worksheet for making plans, and then, at the end of the lab session, used that layout to make plans for their next day. The layout descriptions were similar to Study 1a. One layout was described as useful “if you are going to **decide ahead of time the specific tasks** you want to accomplish and **decide as you go when you will do each task.**” The other layout was described as useful “if you are going to **decide ahead of time the specific tasks** you want to accomplish and **decide ahead of time when you will do each task.**” Participants chose between the layouts, planned their own tasks using the chosen layout during the lab session, and finally took home their plans. The participant’s choice for themselves was the key outcome variable.

The “Other” condition was similar to the “Self” condition, with a few key exceptions. Participants chose a layout for another student, and the other student used the chosen layout to plan their tasks during a lab session. Additionally, the question and the layout descriptions were worded for choosing for another student (e.g., read “they” instead of “you”). The participant’s choice of layout for another student was the key outcome variable.¹

Study 1b Results

Students chose the flexible layout for themselves more frequently (44.7%) than they chose it for another student (32.0%), as predicted by H_1 . The difference in choices was marginally significant ($\chi^2(1) = 3.64, p = .056$).

Study 1c Methods

Participants. Participants completed a short survey on Prolific in exchange for monetary compensation. We recruited 1,003 participants (463 female, 524 male, 16 other/unspecified; $M_{\text{age}} = 36.3$ years, $SD = 13.5$) at the beginning of the year (on January 2, 2021²). The final sample size was $N = 565$ (235 female, 324 male, 6 other/unspecified; $M_{\text{age}} = 35.1$ years, $SD = 12.2$) due to the preregistered exclusion criteria (discussed subsequently).

¹ To make length of the experiment similar across conditions, participants in the “Other” condition chose and filled out a layout. This part of the experiment was on a separate page, after the key dependent variable. As explained our preregistration, these responses were not relevant to the primary hypothesis. We do not examine this portion of the data further.

² We chose this date based on Google Trends data for how frequently people search for terms like “diet,” “gym,” and “save money” in Google. In late December and early January, searches for these terms tended to peak on January 2, suggesting people are likely to be planning for their resolutions at about this time.

Procedure. In this study, participants made real choices and plans for New Year's resolutions. At the beginning of the survey, participants indicated if they had a New Year's resolution, and, if yes, what the most important resolution was: "exercise more," "lose weight," "save more money/spend less money," "learn a new skill or hobby," or "other." The key analyses include participants who were pursuing one of these four common New Year's resolutions ($N = 565$). (We excluded participants if they did not have a resolution or indicated "other,"³ or if they did not finish the survey.⁴) Participants indicated their age and gender, right after questions about their resolutions and before the key dependent variables.

Next, the study followed a 2 ("Self" condition vs. "Other" condition) \times 4 ("Exercise" condition vs. "Lose Weight" condition vs. "Save Money" condition vs. "Learn Skill" condition) design. Participants always considered the resolution they had just indicated was their most important resolution (e.g., exercise). Participants were randomly assigned to make choices for themselves or for another person with the same resolution.

Participants first read instructions about what they would be doing. In the "Self" condition, they learned they would choose a planning method for themselves, and then use it to make real plans. In the "Other" condition, they learned they would choose a planning method for someone else, and the other person would use the method to make real plans. Participants had to correctly answer a multiple-choice comprehension check about what they would be doing before they proceeded to make choices.

Next, participants chose between a flexible method and a rigid method of planning. The descriptions were similar to Studies 1a and 1b: "Method A: This method is useful if you [they] are going to **decide on the details ahead of time**" and "Method B: This method is useful if you [they] are going to **decide on the details as you [they] go.**" We also included short example plans tailored to their resolution beneath each method. Participants in the "Self" condition were asked the following (the wording for the "Other" condition is displayed in brackets): "Consider which method would be best for you [the other participant]. Which method do you choose [assign the other participant] to use during this [their] study?"

³ To keep the time that the survey took to complete similar across participants, we asked these excluded participants to answer some hypothetical questions about what the best method would be for someone pursuing a New Year's resolution. We do not examine this portion of the data further.

⁴ We found some evidence of selective attrition in this study (Zhou and Fishbach 2016), though no evidence that our results could be explained by selective attrition. Specifically, more participants dropped out from the "Self" condition (24/305) than from the "Other" condition (9/293, $\chi^2(1) = 6.60$, $p = .010$). We suspect this is because there was an effortful task (writing a plan) in the "Self" condition but not in the "Other" condition. However, even if every single one of these 33 dropouts had completed the study and chosen in a direction counter to the hypothesis, the results would still be highly significant ($p < .001$). Dropout in all other studies was rare (always $< 1.7\%$), except in Study 1a (an online survey with students for course credit, which had 13.4% attrition) and Study 5b (field study, with 3.8% attrition rate). We found no evidence of selective (condition-dependent) attrition in other studies.

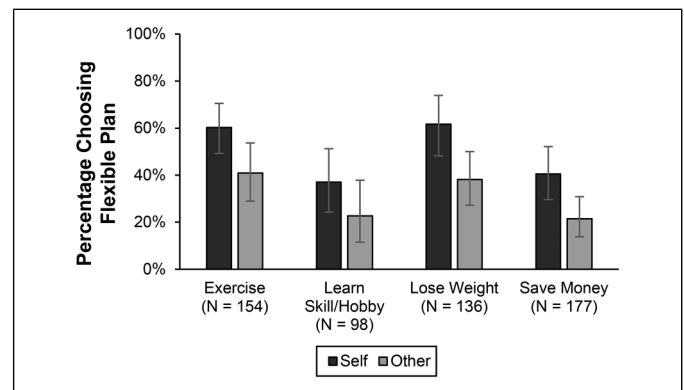


Figure 1. People Chose Flexible Plans More Often for Themselves Than for Others in Study 1c.

Notes: Error bars are 95% confidence intervals.

Finally, we had people make plans using the chosen methods to make their choices real. (Participants in the "Self" condition wrote out a plan using prompts for flexible or rigid planning, then exited the survey. Participants in the "Other" condition exited the survey, and to make their choices real, we recruited a new sample of participants who made plans using the assigned method from an "Other" condition participant with whom they had been yoked.)

Study 1c Results

Collapsing across resolutions, participants choose flexibility more often for themselves (50.5%) than for others (30.6%; $\chi^2(1) = 23.21$, $p < .001$), as predicted in H_1 . This pattern was consistent across resolutions (see Figure 1), and significant in three out of four cases (exercise: $N = 154$, self = 60.2%, other = 40.9%, $\chi^2(1) = 5.64$, $p = .018$; weight loss: $N = 136$, self = 61.7%, other = 38.2%, $\chi^2(1) = 7.42$, $p = .006$; save money: $N = 177$, self = 40.5%, other = 21.4%, $\chi^2(1) = 7.59$, $p = .006$; learn skill: $N = 98$, self = 37.0%, other = 22.7%, $\chi^2(1) = 2.34$, $p = .126$).

Discussion

Across Studies 1a–1c, participants chose rigid plans for others. Choosing for themselves, as opposed to others, led people to choose flexible plans more often. These studies provide evidence for the external validity and generalizability of this self/other asymmetry.

First, we found evidence for our effect in multiple studies with real (as opposed to hypothetical) goals and consequential (as opposed to hypothetical) choices. All three studies included real goals participants actually held (studying for next week's final exams in 1a; tasks for the next day in 1b; New Year's resolutions in 1c). Additionally, participants in Studies 1b and 1c actually made a plan for their goals or actually assigned others to make a plan. In these cases, when participants wrote out plans for their current goal, we see robust evidence of a self/other

difference in choosing flexibility. Second, we found the effect for goals that participants chose for themselves, across many types of goals (e.g., studying, fitness, everyday tasks, saving money, and learning new skills). The self/other difference occurred in all these contexts. Thus, the effect is not limited to unfamiliar domains or unimportant goals.

Third, the self/other difference in choosing a flexible plan was robust across multiple operationalizations of flexibility throughout Studies 1a–1c. In some cases (e.g., Studies 1a and 1b), people could reduce flexibility by determining ahead of time when to do a task (as opposed to deciding when to do a task as they go). However, while specific scheduling is one way to reduce flexibility, it is not the only way. In other cases, people could reduce flexibility by deciding in advance what specific goal-directed actions they would take (in Study 1c, which items to save money on or what to eat). Our effects are robust across not only many different goals, but also many different ways of reducing the flexibility of plans.

Finally, the difference in participants' views about flexibility for themselves and others also seems robust to different ways of asking about choices for others. For example, participants chose flexibility for themselves more than they *recommended* it to others (Study 1a) and more than they *chose* it for others (Studies 1b and 1c). However, both measures have potential drawbacks. Deciding what to recommend to someone else is natural and externally valid, but the word "recommend" might cause participants think more unemotionally and give more weight to the efficacy of a plan. Making choices for others is also externally valid, but multiply determined. We predict that consumers think rigidity is the best choice for others (but not as much for themselves). Insofar as consumers are relying on what they think is best when they choose for others, we predict a self/other gap in actual choices. However, sometimes, people might think one thing is best for another person but end up choosing something else. For example, people might not want to impose a decision on someone else, making them less likely to actually choose rigidity for the other person. (We will return to the boundary conditions of choosing differently for others in Study 4.) Therefore, for most of the remaining studies, we move to a wording that avoids these issues, which is identifying "the best choice" for yourself or for someone else. Next, we will examine the psychology underpinning how people decide what the best choice is for themselves and for someone else.

Study 2: Following Your Heart as Mediator

On the face of it, making a concrete plan to accomplish a goal and sticking to that plan seems like an effective way to succeed. And yet, making a concrete plan can be difficult, and sticking to it can be even harder. We believe that there is a clash between what people know will be effective and what feels appealing. When thinking about themselves, what they want to do—what feels good—is to give themselves flexibility, so they are not hemmed in by the constraints they set and can make

changes if they want to. But when people think about others, those concerns are put aside, and they opt for the path that logically seems more likely to keep someone on track to achieving their goal. We hypothesize that people incorporate how something will feel more for their own choices than when choosing for others, which leads people to choose flexibility more often for themselves than for others.

Studies 2 and 3 begin to examine this proposed psychological process. Study 2 (testing H₂) examines this mechanism using mediation techniques. Participants considered the best way for themselves or another person to pursue a goal to read more, and indicated whether they were following their hearts versus their heads when they chose. We expected that participants would follow their hearts (vs. their heads) more for their own reading goals than for another person's reading goals, and this difference would mediate the self/other effect on choice of flexibility.

Methods

Participants. Participants (N = 403) completed a short survey on Amazon Mechanical Turk in exchange for monetary compensation (211 female, 189 male, 3 other/unspecified⁵).

Procedure. Participants read a scenario about pursuing a goal to read more. We randomly assigned participants to consider themselves or another person. We operationalized flexibility similarly to Study 1. In the "Self" condition, participants read that in a rigid plan, "You will commit to reading every day, and **decide ahead of time** exactly which times you will read each chapter of the book (for example: decide you will read a chapter every morning with your coffee)," and in a flexible plan, "You will commit to reading every day, and **decide as you go** which specific times you will read each chapter of the book (for example: decide on a day-by-day basis whether you will read in the morning or at night)." The descriptions in the "Other" condition were similar, but worded in terms of another person (e.g., substituting "they" for "you"). For the key choice variable, participants answered, "Which is the best choice for you [for this person]?" (The two response options were the two plans, with their descriptions repeated verbatim.)

After the choice, on a separate page, participants read about how there are two broad ways to make a choice (adapted from Woolley and Risen 2018): "'Following your heart' – following your immediate, intuitive, emotionally-charged, gut reactions" and "'Following your head' – following your slow, deliberative, thoughtful, reasoned reflection." Participants then indicated how they made their choice, on a seven-point scale (1 = "I was completely following my head," 4 = "I was

⁵ Due to an oversight, some participants were not able to enter their correct birth year in Studies 2 and 3, because the study settings would not allow participants to submit a birth year greater than 2000. Therefore, we do not report age estimates for these studies.

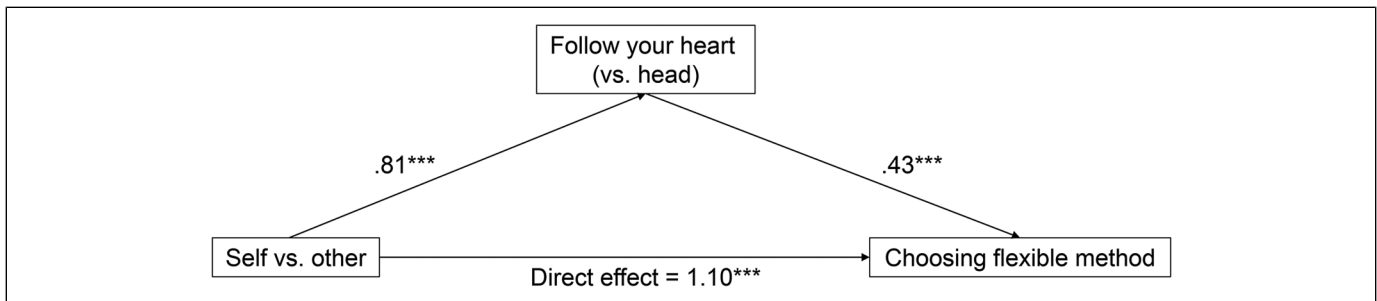


Figure 2. Mediation Model in Study 2.

*** $p < .001$.

equally following my head and my heart,” and 7 = “I was completely following my heart”). We also counterbalanced the order so that half of the participants saw “following your head” described first and as the left endpoint and the other half of the participants saw “following your heart” described first and as the left endpoint. In the subsequent analyses, we collapsed across order and scored all responses so that higher scores meant following your heart more.

At the end of the survey, participants indicated their age, their gender, and whether they personally had a goal to read more.

Results

Participants were more likely to indicate that the flexible plan was the best choice for themselves (58.9%) than for someone else (27.8%; $\chi^2(1) = 39.58, p < .001$), as predicted in H_1 and consistent with results from Study 1.

Additionally, participants tended to follow their hearts rather than their heads more when choosing for themselves ($M = 3.43, SD = 1.73$) versus for others ($M = 2.63, SD = 1.54; t(401) = 4.91, p < .001, d = .49$). Because the scale was bipolar, scores above the midpoint of 4 indicated following one’s heart more, and scores below 4 indicated following one’s head more. Therefore, across conditions, participants followed their heads more than their hearts, in general (in one-sample t-tests compared with the midpoint of 4, $M_{\text{other}} = 2.63, SD = 1.54, t(204) = -12.68, p < .001, d = -.89$; $M_{\text{self}} = 3.43, SD = 1.73, t(197) = -4.60, p < .001, d = -.33$). This is not surprising, since they were making plans for a self-improvement goal, and making plans generally might nudge people to try to rely on dispassionate logic as opposed to what feels good emotionally. However, the reliance on following one’s head was most extreme when choosing for others, whereas in the “Self” condition people followed their heads and hearts more equally.⁶

Finally, as predicted by H_2 , following one’s heart versus following one’s head mediated the effect of whom participants

were choosing for (self vs. other) on which plan they chose (see Figure 2). We fit a mediation model using PROCESS in SPSS (Hayes 2018). In this mediation model, the indirect effect of self versus other on choice via following one’s heart was statistically different from zero (.35; 95% CI: [.18, .56]). Additionally, the direct effect of self versus other on choice was significant ($B = 1.10, p < .001$), suggesting that the effect of self versus other on choice is multiply determined.

Discussion

Study 2 finds support for the hypothesized mechanism using mediation techniques: the effect of choosing for oneself (vs. for another person) on preference for a flexible plan was partially mediated by how much participants reported following their hearts rather than their heads. This is consistent with our hypothesizing that a meaningful part of the reason why consumers opt for flexible approaches to pursuing their goals is because flexibility feels good. In the next study, we continue to test the process by which consumers come to choose flexibility or rigidity, and also begin to test how consumer choices might be changed.

Study 3: Moderating Following Your Heart Versus Head

One reason why people choose rigidity more for others than for themselves seems to be that people follow their heads (rather than their hearts) more for others than for themselves. One corollary (formalized as H_3) is that the difference in preferences for self and other will attenuate if people follow their heads to a similar extent when choosing for themselves as when choosing for others. Study 3 tests this hypothesis, turning to moderation techniques to complement Study 2’s mediation approach to testing the proposed psychological process (Spencer, Zanna, and Fong 2005). Specifically, in the present study, participants thought about their own or others’ plans to eat healthy. Half of the participants were instructed to follow their heads. We expected that this encouragement would make choices for the self and for another look similar (and rigid).

⁶ We did not preregister the analyses in this paragraph. We report them because they are useful for understanding the preregistered mediation analysis.

Methods

Participants. Participants ($N = 1,201$) completed a short survey on Amazon Mechanical Turk in exchange for monetary compensation (664 female, 511 male, 6 other/unspecified).

Procedure. The study followed a 2 (“Self” condition vs. “Other” condition) \times 2 (“Follow Your Head” condition vs. “Control” condition) fully between-subjects design. First, participants read about the distinction between following your head and following your heart (using the explanation from Study 2), and then answered how they tended to make decisions, in general (1 = “I always follow my heart,” and 5 = “I always follow my head”). This item was not part of the key hypotheses, but we included it so that participants in the “Control” condition would not wonder why we gave the definitions of following your heart and head without using them in the subsequent scenario.

Next, participants read instructions about the next part of the survey. The instructions said (the “Follow Your Head” condition text is in brackets): “**We ask that you read the following scenario carefully and make a choice [by FOLLOWING YOUR HEAD. That is, please follow your slow, deliberative, thoughtful, reasoned reflection].**” Then, on a separate page, participants read the scenario and made a choice about making plans for eating healthy. The scenario in the “Self” condition, for example, read as follows:

Imagine **YOU** are interested in eating healthy.

At the one extreme, you might **decide every single thing as you go**, including what you eat, when you eat, how much you eat, and what you do if you have cravings. (For example, you might decide to eat healthy and choose you meals as you go.)

At the other extreme, you might **decide every single thing ahead of time**, including what you will eat, when you will eat, how much you will eat, and what you will do if you have cravings. (For example, you might decide to eat healthy and plan each meal, down to the gram, ahead of time in a planner.)

[Please make this choice by FOLLOWING YOUR HEAD.] What is the best choice for YOU?

For our key dependent variable, participants selected on a scale how much flexibility they wanted (1 = “deciding every single thing as I go,” and 7 = “deciding every single thing ahead of time”). (In our analyses, we reverse-scored this item so that higher scores meant more flexibility in the plan.) In the “Other” condition, the wording was similar, except we used “another person” instead of “you” in the first and last sentences of the scenario, and singular “they” pronouns instead of “you” pronouns throughout the scenario.

After the scenario, participants answered a manipulation check: “How did you make your decision about which eating plan was best for you [this person]?” (1 = “I was completely following my heart,” 4 = “I was equally following my heart and

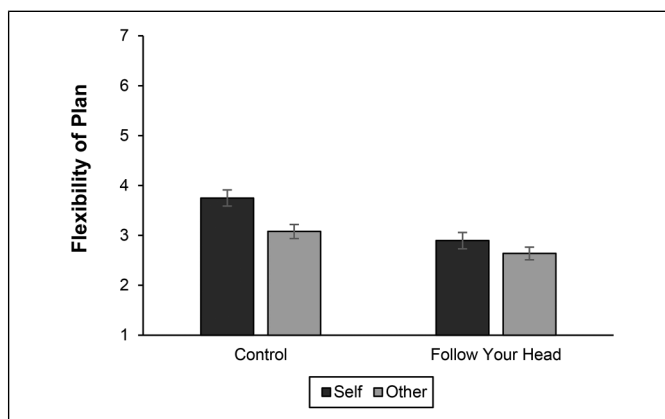


Figure 3. Instructing Participants to Follow Their Heads Moderated the Self/Other Effect on Flexibility in Study 3.

Notes: Error bars are 95% confidence intervals. For flexibility, higher scores indicate more flexibility in a plan.

my head,” and 7 = “I was completely following my head”).⁷ Finally, at the end of the survey, participants indicated their age, their gender, and whether they personally had a goal to eat healthy.

Results

Manipulation check. Participants in the “Follow Your Head” condition reported following their heads more ($M = 6.04$, $SD = 1.14$) than participants in the “Control” condition ($M = 5.13$, $SD = 1.38$; $t(1,199) = 12.48$, $p < .001$, $d = .72$).

Choice of flexibility. Participants again opted for more flexibility for themselves than for someone else, but this difference was smaller when they were explicitly instructed to follow their heads. We assessed preferred degree of flexibility using a 2 (“Self” condition vs. “Other” condition) \times 2 (“Follow Your Head” condition vs. “Control” condition) analysis of variance. Participants chose more flexibility for themselves than for others ($F(1, 1,197) = 36.80$, $p < .001$) and more in the “Control” condition than in the “Follow Your Head” condition ($F(1, 1,197) = 71.42$, $p < .001$). Most importantly, as predicted by H_3 , there was an interaction ($F(1, 1,197) = 7.35$, $p = .007$; see Figure 3). This interaction shows that the effect of self versus other is significantly smaller when participants were all instructed to follow their heads. There was a significant difference between self and other in the “Control” condition ($M_{\text{self}} = 3.75$, $SD = 1.50$ vs. $M_{\text{other}} = 3.08$, $SD = 1.21$; $t(609) = 6.05$, $p < .001$, $d = .49$). There was also a smaller, albeit significant, difference between self and other in the “Follow Your Head” condition ($M_{\text{self}} = 2.90$, $SD = 1.41$ vs. $M_{\text{other}} = 2.64$, $SD = 1.13$; $t(588) = 2.45$, $p = .015$, $d = .20$).

⁷ For about the first 195 responses, the manipulation check said “reading plan” in the question instead of “eating plan,” due to a typo. We fixed the typo in the middle of the study, before the last 1,006 responses were collected.

Discussion

Together, Studies 2 and 3 provide support for the proposed mechanism, via both mediation and moderation techniques. We posit that one key driver of the self/other difference is a difference in whether people follow their heads more (and rely on dispassionate logic and reason) or follow their hearts more (and rely on feelings and emotion). When choosing for others, people follow their heads more than their hearts. Following their heads leads them to choose (effective) rigidity for others. However, when choosing for themselves, people are less immune to considerations of the heart, which leads them to add more (appealing) flexibility to their own plans. Instructing people to follow their heads leads people to prefer similar (rigid) plans for themselves and for others.

One concern with Study 3 might be that the instruction to follow your head is too heavy-handed, and therefore the observed results would be merely a demand effect. We think it is likely that participants realize that following your head should lead one to choose rigidity. This would be consistent with our mechanism, that people recognize rigidity as effective and logical. However, we think it highly unlikely that participants would infer that the key hypothesis is an interaction, such that people given instructions to follow their head are more affected when making choices for the self than for someone else. Therefore, we view it as unlikely that the key (interaction) hypothesis is an artifact of a demand effect.

Next, Studies 4 and 5 examine boundary conditions implied by our theorizing, looking at when choices for others can resemble choices for the self (Study 4) and when choices for the self can resemble choices for others (Study 5).

Study 4: When Choices for Others Resemble Choices for the Self—Gift Giving

When might we make choices for others that are more similar to the choices we make for ourselves? Although advice and recommendation are common contexts in which people make choices for others, they may also try to satisfy goals besides helping others succeed. Some reasons or occasions when someone chooses on behalf of another person may prompt people to follow their hearts and try to find something that feels good. Gift giving is one such occasion. Gifts are supposed to be fun (Kim, Williams, and Rosenzweig 2023), and gift givers feel that the gifts they choose should come from the heart. Therefore, choosing a gift for another person, as opposed to making a recommendation or choice for another person, should increase the degree to which we follow our hearts. A pretest supported this supposition. We asked 100 participants from Prolific to answer three questions on a scale (1 = “completely following my head,” and 7 = “completely following my heart”): “How would you think about what type of product (e.g., what type of planner or calendar) to give as a **gift** to another person?”; “How would you think about what type of product (e.g., what type of planner or calendar) is the **best choice** for another person?”; and “How would you think

about what type of product (e.g., what type of planner or calendar) you would **recommend** or advise another person to use?” People said they would follow their hearts more when giving a gift than when choosing the best choice or giving recommendations ($M_{\text{gift}} = 4.32$, $SD_{\text{gift}} = 1.54$ vs. $M_{\text{bestchoice}} = 3.19$, $SD_{\text{bestchoice}} = 1.35$; $t(99) = 6.50$, $p < .001$, $d = .65$; $M_{\text{gift}} = 4.32$, $SD_{\text{gift}} = 1.54$ vs. $M_{\text{recommend}} = 3.02$, $SD_{\text{recommend}} = 1.30$; $t(99) = 7.41$, $p < .001$, $d = .74$).

Because gift giving increases the degree to which people follow their hearts when choosing for others, in Study 4 we testing gift giving as a moderator. We examined products—here, planners—that can allow users to plan with more or less flexibility. We asked some participants to indicate which planner was the best choice for themselves, and we asked some participants to indicate which planner was the best choice for others. Here, we expected to replicate previous studies and find that people would choose the flexible planner for themselves more than they would choose it for others. Finally, a third set of participants chose which planner they would give as a gift. Our pretest suggested that choosing a gift increases how much people follow their hearts, compared with deciding the best choice for someone. Therefore, we expected that people choosing a gift (vs. deciding the best choice for someone else) would be more likely to choose flexibility, making the self/other difference when choosing a gift for others smaller.

Methods

Participants. Participants ($N = 750$) completed a short survey on Prolific in exchange for monetary compensation (361 female, 367 male, 22 other/unspecified; $M_{\text{age}} = 31.5$ years, $SD = 11.3$).

Procedure. We randomly assigned participants to one of three between-subjects conditions (“Self” condition vs. “Other” condition vs. “Gift” condition). In all conditions, participants chose between a planner with a flexible layout and a planner with a rigid layout. The flexible and rigid layout descriptions were similar to Study 1b, where in the “Self” condition the flexible layout was described as good for deciding “ahead of time when you will do each task” and the rigid layout was described as good for deciding “as you go when you will do each task.” (In the “Other” condition, we substituted “they” for “you.”)

In the “Self” condition, participants imagined they were interested in using a planner to help themselves achieve their goals, and they indicated, “Which planner is the best choice for YOU?”

In the “Other” condition, participants imagined another person was interested in using a planner to help themselves achieve their goals, and they indicated, “Which planner is the best choice for ANOTHER PERSON?”

Finally, in the “Gift” condition, we made a few adjustments. The background of the survey was a picture of a gift instead of a white, neutral background, and participants were told that the study was about gift giving. Participants imagined another person was interested in using a planner to help themselves achieve their goals. Participants responded to the question,

“Which planner would you GIVE AS A GIFT TO ANOTHER PERSON?”

After choosing, participants indicated their age and gender before exiting the survey.

Results

First, we examined the “Self” condition and “Other” condition (excluding participants in the “Gift” condition). Replicating prior studies, participants chose the flexible planner more for themselves (49.1%) than for others (34.2%; $\chi^2(1) = 11.08, p = .001$).

Next, we examined the “Gift” condition and “Other” condition (excluding participants in the “Self” condition), to examine whether a gift-giving goal changed participants’ choices. As predicted in H_4 , when participants were choosing a gift, they chose a flexible planner for someone else more frequently (44.1% vs. 34.2%; $\chi^2(1) = 4.71, p = .030$). In fact, there was no longer a reliable self/other difference when people were choosing gifts for others. That is, when comparing the “Self” condition with the “Gift” condition, we find that people chose flexibility at similar rates for themselves (49.1%) and for others (44.1%; $\chi^2(1) = 1.36, p = .244$).

Discussion

Sometimes, we choose for others what they might want, enjoy, or find emotionally appealing instead of what we think is best for them. The self/other effect documented in this research should be smaller (or perhaps sometimes even be reversed) in these contexts, so that consumers choose flexible options for others as well as for themselves. Study 4 finds support for this boundary condition, showing that people chose a flexible option more frequently when giving a gift to another person than when determining the best choice for another person.

Study 5: When Choices for the Self Resemble Choices for Others—Highlighting Staying on Track

Gift giving is a context in which choices for others look more like choices for the self, but in the context of goal pursuit, it might often be desirable to make people’s choices for themselves resemble the choices they would make for others. Study 3 suggested that one way to do this is to explicitly instruct people to follow their heads. In Studies 5a and 5b, we aimed to test subtler, more easily implemented nudges. As we have shown, following one’s head increases the weight one gives to dispassionate considerations. We now focus on one such consideration: the perceived benefit of rigidity for staying on track. If following one’s head entails thinking about staying on track with rigidity, which increases preferences for rigidity, then experimentally encouraging people to think about staying on track should also increase preferences for rigidity. Relatedly, highlighting staying on track should make self/other differences in choice of

flexibility smaller (because it should make participants focus on a consideration of “the head,” not of “the heart,” in both the self and other conditions). We test this hypothesis in Study 5.

In Study 5a, we highlighted the idea of staying on track to some participants, by having those participants answer questions about which plan was most effective and best for staying on track, before they chose a plan. We expected that merely asking these questions would make the considerations of efficacy and staying on track more salient. In the case of choosing for oneself, we expected this manipulation to increase people’s preference for (effective) rigid plans, because it should nudge people to place higher importance on these salient considerations in their choices (MacKenzie 1986). In the case of choosing for others, though, people already tend to follow their heads and base decisions on dispassionate, logical considerations like staying on track. Therefore, we did not expect this manipulation to have much impact on choices for others. Consequently, choices for both the self and others should be similarly rigid when staying on track is made salient.

In Study 5b, we tested a similar nudge in a field study. We focused on consumers’ choices for themselves and examined whether consumers could be led to prefer rigidity for their own fitness pursuits. We collaborated with FlexIt, a fitness technology company that offers virtual personal training sessions (workout sessions with a trainer through video chat). Prospective FlexIt customers took a quiz about what they wanted in a workout program when they arrived at the company’s website. These were not purchases or binding choices, but the information was used to highlight product offerings to the customer and was also applied by the company’s trainers to help customize sessions for prospective customers. The quiz asked, among other things, about the customer’s preference for rigid versus flexible schedules. We manipulated the description of the rigid schedule option in FlexIt’s quiz to test whether emphasizing a rigid schedule’s ability to help potential customers stay on track would increase preferences for rigidity. We anticipated that quiz takers would be more likely to choose the rigid plan when staying on track was highlighted.

Study 5a Methods

Participants. Participants completed a short survey on Prolific in exchange for monetary compensation. We recruited 601 participants (419 female, 167 male, 15 other/unspecified; $M_{\text{age}} = 27.9$ years, $SD = 10.3$).

Procedure. The study followed a 2 (“Control” condition vs. “Stay on Track” condition) \times 2 (“Self” condition vs. “Other” condition) mixed design, where the first factor was between-subjects and the second factor was within-subjects. All participants first imagined they were interested in improving their fitness. Then, they read about options for creating a workout schedule:

You could **prioritize consistency and structure**. For example, you might decide ahead of time to workout Monday, Wednesday, and Friday at 7am.

Alternatively, you could **prioritize flexibility to change things as you go**. For example, you might decide to workout three times a week, and decide if and when to exercise on a day-to-day basis.

In the “Control” condition, participants indicated which option was the best for themselves (“prioritize consistency and structure” or “prioritize flexibility to change things as I go”). Next (on subsequent pages), participants imagined another person trying to improve their fitness and indicated what the best choice was for that person. Thus, each person indicated both the best choice for themselves and for someone else. Then, participants indicated their age and gender before completing the survey.

The “Stay on Track” condition was identical to the “Control” condition, except that participants answered two additional questions. After reading the scenario but before making any choices, participants in the “Stay on Track” condition indicated which type of schedule is “more effective for improving your fitness” and which type of schedule is “best for staying on track to achieving a goal to improve your fitness.” We posed these questions to increase the salience of the idea of staying on track toward a goal.

Study 5a Results

Efficacy and stay-on-track items. Our experimental manipulation was the presence (vs. absence) of questions about a plan’s efficacy and ability to help people stay on track. Therefore, only about half of the participants ($N = 310$ in the “Stay on Track” condition) answered questions about efficacy and staying on track. Of these 310 participants, 218 (70.3%) said the rigid plan was more effective. Moreover, of the 310 participants, 258 (83.2%) said the rigid plan was better for staying on track. Therefore, paralleling the pilot data reported in the introduction, people believed rigid plans were more effective and helpful for staying on track. In subsequent analyses, we include all participants regardless of which plan they indicated as most effective and best for staying on track.

Choices. We next examined whether the stay-on-track nudge reduced the self/other difference. Specifically, per our preregistered analysis plan, we ran a logistic regression with the dependent variable of plan choice (1 = flexible, 0 = rigid), predictors of condition (1 = stay on track, 0 = control), target (1 = other, 0 = self), and their interaction, and clustered standard errors by participant to account for repeated measures from each participant. As predicted in H_{5a} , the logistic regression revealed a significant interaction ($b = .47, z = 2.04, p = .041$).

The nature of this interaction is displayed in Figure 4. In the “Control” condition, people chose flexible plans significantly more often for themselves (47.1%) than for others (30.6%; $b = -.70, z = -4.43, p < .001$). In the “Stay on Track” condition, there was no longer a reliable difference between how often people chose flexible plans for themselves (39.0%) versus for others (33.5%; $b = -.24, z = -1.45, p = .147$). Put differently, when choosing for themselves, people chose flexible plans

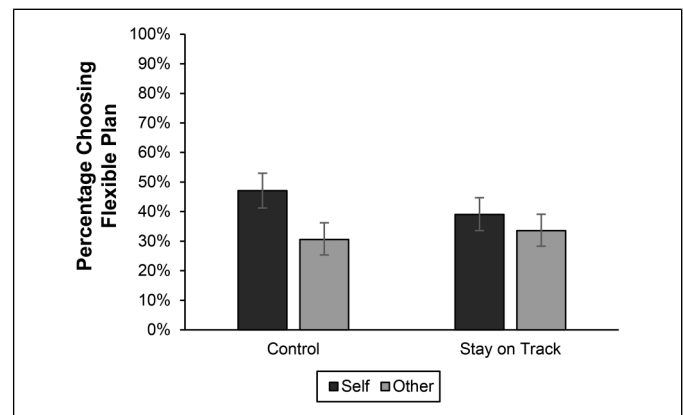


Figure 4. Making Considerations of Efficacy and Staying on Track Salient Moderated the Self/Other Effect on Flexibility in Study 5a. Notes: Error bars are 95% confidence intervals.

more often in the “Control” condition (47.1%) than in the “Stay on Track” condition (39.0%, $b = -.33, z = -1.99, p = .047$), consistent with H_{5b} . However, when choosing for others, there was no reliable difference in choice of the flexible plan between the “Control” condition (30.6%) and the “Stay on Track” condition (33.5%; $b = .14, z = .78, p = .437$).⁸

Study 5b Methods

Participants. In Study 5b, we collaborated with FlexIt, a fitness technology company that offers virtual personal training sessions. At the time of the experiment, FlexIt had a home page with a button that said “Take our Goals Quiz!” in the center of the screen. Customers’ responses to this quiz were not binding choices or purchases. Rather, FlexIt used the customer’s responses on the quiz to highlight product offerings and help the company’s trainers customize workout sessions. Our participants were customers who arrived at FlexIt’s website and chose to take the quiz. As a simplifying assumption, we assume each participant took the quiz only once. We ran the study between September 7 and October 7, 2021, and collected data from 1,380 participants.

Procedure. We manipulated the wording of an item in this quiz, as part of a field experiment. The quiz asked three questions. The first question was “What is your wellness goal?” with the response options “Get stronger,” “Lose weight,” “Athletic performance,” “Rehabilitate an injury,” “Improve overall fitness,” and “Not sure, I could use some help.”⁹ The second question was “How active are you?” with the response options “I’m

⁸ We did not preregister the analyses in this paragraph. We report them because they are useful for understanding the preregistered test of the interaction.

⁹ People who selected “Not sure, I could use some help” were directed out of the quiz and asked if they wanted to speak with a consultant.

Goals Lifestyle Schedule

When I schedule workout sessions, I want to:

Let us know how you want to schedule.

Prioritize consistency and structure

Prioritize flexibility to change things as I go

Figure 5. A Screenshot of the Quiz Question in Study 5b's Control Condition.

new to fitness," "It's been a while," "I work out occasionally," and "Fitness is part of my routine."

The third question asked about scheduling workout sessions, and it was the focus of this study. A screenshot of this question (in the "Control" condition) is displayed in Figure 5.¹⁰ Both the "Control" condition and "Stay on Track" condition included two options. One response option in both conditions was "Prioritize flexibility to change things as I go." For our purposes, FlexIt manipulated the other response option describing rigid plans. This option read as follows, where the additional wording for the "Stay on Track" condition is in brackets: "Prioritize consistency and structure [to make sure I stay on track]." Each question was presented on a separate page in a fixed order, and the response options were presented in a fixed order.

Study 5b Results

As predicted by H_{5b} , participants choose rigidity more often in the "Stay on Track" condition. In the "Control" condition, 64.5% (459 of 712 participants) chose rigidity, whereas in the "Stay on Track" condition, 76.3% (510 of 668 participants) chose rigidity ($\chi^2(1) = 23.26, p < .001$). Thus, in a field setting with prospective customers, highlighting the idea of staying on track nudged customers to choose the more rigid plan.

Discussion

Studies 5a and 5b offer one way to get consumers to choose rigidity for themselves. When the idea that a rigid plan can

help people stay on track is made salient, consumers are more likely to choose the rigid option. Additionally, choices for oneself and others look more similar when staying on track is made salient. This finding adds support to our proposed mechanism: when efficacy is highlighted, people choose similarly for themselves and others, which is consistent with the idea that self/other differences in weighing efficacy considerations drive self/other differences in choice of flexibility versus rigidity.

General Discussion

Across our studies, we find that consumers choose flexible goal plans more often for themselves than for others. Study 1 provided evidence for this key effect. Students chose flexibility for their study plans more often than they recommended it for others (Study 1a). When making actual choices and writing out actual plans for the next day (Study 1b) or for a New Year's resolution (Study 1c), people chose flexible plans more often for themselves than they did for others. Studies 2 and 3 examined the proposed mechanism: thinking about oneself instead of someone else causes people to "follow their heart" (vs. "follow their head") more, which leads people to incorporate flexibility into their plans. Consistent with this proposed mechanism, whether people are following their heart versus following their head mediated the self/other difference in choosing flexibility (Study 2), and asking everyone to follow their head moderated the self/other difference in choosing flexibility (Study 3). Studies 4 and 5 examined generality and boundary conditions. Study 4 looked at when choices for others look like choices for the self: when choosing for others, people are more inclined to follow their heart to flexibility if they are giving a gift. Study 5 looked at when choices for the self resemble choices for others. Making efficacy and staying on track (considerations of the "head") salient nudged people to choose rigidity for themselves and reduced the self/

¹⁰ Between September 7 and September 10, there were two formatting errors: the word "flexibility" was capitalized in both conditions, and the rigid option in the "Stay on Track" condition was slightly off-center. See the OSF link in the "Research Overview" section for screenshots. These errors were fixed in the morning of September 10.

other gap (Study 5a). And in a field experiment with a fitness company, highlighting that rigid plans help people stay on track increased customers' preference for rigidity in their own plans (Study 5b). Together, these studies offer insights about when and why flexibility in goal pursuit is appealing.

Contribution

This research is one of the first, to our knowledge, to examine people's beliefs about flexibility in goal pursuit. A great deal of research has been devoted to understanding whether flexibility or rigidity can help consumers succeed (Ariely and Wertenbroch 2002; Gollwitzer and Sheeran 2009). Less research has been devoted to consumers' beliefs about flexibility and when and why they choose it. We show that many consumers perceive rigidity as effective, but also more unpleasant, which creates a dilemma when they choose how to pursue a goal. As a result, when and whether people choose flexibility is determined in part by whether they follow their hearts toward the appeal of flexibility or follow their heads toward the efficacy of rigidity.

Our research also shows that a head/heart conflict can be embedded in decisions about how to pursue a goal. Prior literature has looked at whether and when following your heart versus following your head prompts people to do something consistent with a goal or do something inconsistent with a goal (Shiv and Fedorikhin 1999; Woolley and Risen 2018). For example, when trying to eat healthy, one might follow one's head and pass on dessert (which is goal-consistent) or follow one's heart and eat a tempting dessert (which is goal-inconsistent). In these cases, the "follow your heart" option is a goal-inconsistent temptation. In contrast, we show that the "follow your heart" option can even be something goal-consistent (like making a flexible goal plan), and that head/heart conflict can emerge between two goal-consistent options (like a flexible plan and a rigid plan) in contexts where people have already decided to be goal-consistent and pursue their goal.

Our research also contributes to the body of work on self/other differences. Prior research finds systematic differences in how we view our own versus others' goal pursuits. People are more likely to use information about intentions and desires when judging themselves, and information about base rates and past behavior when judging others (e.g., Andersen and Ross 1984; Epley and Dunning 2000; Helzer and Dunning 2012). Our work adds to this literature by showing that, beyond the support they bring to their judgments, people explicitly indicate that they think about choices for themselves and others differently, following their hearts more when they think about themselves than when they think about others. Additionally, one prior research stream shows that people believe paternalistic plans (which are often more rigid) are more effective for others than for themselves (Schroeder, Waytz, and Epley 2017). We add to this finding by testing whether rigid plans are chosen more for others, and by testing

a novel reason for why this occurs (namely, differences in following one's head vs. one's heart).

Managerial Implications

This research has important pragmatic implications. Many marketers may want to nudge consumers to make rigid, detailed plans. For example, FlexIt (the company from Study 5b) was interested in prioritizing recurring schedules for new customers given that customers who have their schedules preset tended to be more consistent and stay on their programs longer. Moreover, many companies offer options for more detailed, rigid plans at a premium price, so nudging consumers toward those plans could increase profitability. WW (formerly Weight Watchers) offers a premium plan that involves more social support and accountability through workshops with a coach and other members. Similarly, the popular fitness app Lose It! allows consumers to track their food intake and plan a general goal (e.g., lose 1 lb per week), and its premium version offers the ability to make more rigid, detailed plans toward a goal (e.g., planning out all your meals in the app ahead of time). Our research tests a low-cost way to increase choice of rigid plans. Emphasizing more dispassionate considerations such as using rigid plans to help stay on track is an easy way to nudge consumers to reduce flexibility in their plans, and we recommend companies use this type of language when promoting tools for rigid plans.

Our work also provides insights about how to structure apps and programs. Some apps and programs offer opportunities for interacting with others through forums or groups or using plans from trainers, tutors, nutritionists, and the like. Other apps do not. Our research shows that people advise and choose for others more structured, rigid plans than they tend to choose for themselves. We expect that adding social features—forums for exchanging advice or trainers and tutors who make choices on behalf of the client—will increase uptake of rigid, structured programs.

Relation to Other Theoretical Frameworks

Our research has features in common with other frameworks. We believe our work is related to but distinct from several research streams about goals, motivation, and assessment.

Want versus should preferences. There is a lot of overlap between the idea of want/should conflicts and following your heart versus following your head. The "want self" has preferences that are emotional, affective, impulsive, and hot-headed, and the "should self" is more rational, cognitive, thoughtful, and cool-headed (Bazerman, Tenbrunsel, and Wade-Benzoni 1998). This is similar to the idea that when you follow your heart, you rely on feelings and emotions, whereas when you follow your head, you rely on dispassionate, rational logic. If one conceptualizes "want" versus "should" as a trade-off between feelings and emotional desires versus dispassionate logic, then our findings could also be described as showing

differences in want/should preferences. In this case, one would be using different terminology (want/should terminology instead of head/heart terminology) to describe the same psychological process (i.e., relying on feelings and emotions vs. dispassionate logic).¹¹

For our proposed mechanism, however, we ultimately viewed the language of following one's heart and following one's head as clearer than want/should language, and so we rely on head/heart language in the article and stimuli. Specifically, the want/should distinction tends to be more closely related to intertemporal preferences, and is sometimes defined in terms of intertemporal dynamics. For example, "want" options have been defined as providing more instantaneous utility and short-run benefits, whereas "should" options provide more utility summed over future periods and long-term benefits (Bitterly et al. 2015; Milkman, Rogers, and Bazerman 2008). Even in Bazerman, Tenbrunsel, and Wade-Benzoni's (1998) definition, "want" options are "impulsive," which implies some intertemporal differences between wants and shoulds. Because our process and measures are more about the trade-off of feelings and emotion versus dispassionate thinking than about discounting or intertemporal choice, we avoided want/should language to minimize confusion.

Dual processing and dichotomies of the mind. The distinction between following one's head and following one's heart shares commonalities with, but is also distinct from, a few proposed dichotomies of the mind. Different researchers use different terminology to describe these two modes. One mode—which might be considered parallel to "following your heart"—is quick, automatic, capturing a gut feeling, and often based on affect and emotion. The other mode—more parallel to "following your head"—is slow, effortful, and precise. These two ways of thinking are variously called experiential versus rational (Epstein 1994), associative versus rule-based (Sloman 1996), System 1 versus System 2 (Kahneman 2003; Stanovich and West 2000), and reason versus feelings (Hsee et al. 2015). All these distinctions are close cousins with the distinction between "following your head" and "following your heart," though these other distinctions place more emphasis on features that we view as less relevant to the current research. For example, these dichotomies focus on aspects such as the amount of processing involved, or whether cognition is based on associative reasoning or similarity-based processing, which we do not believe are as relevant to the goal pursuit decisions we study here. In the present research, we focus specifically on the weight given to feelings and desires versus to dispassionate reason, again supporting

our reliance on following one's heart versus one's head as the way to capture how people think about the goal pursuit choices here.

Intrinsic versus extrinsic motivation. The constructs studied in the present work are also related to, but again distinct from, intrinsic and extrinsic motivation (Kruglanski et al. 2018; Ryan and Deci 2000). Ryan and Deci (2000) describe intrinsic motivation as "the inherent tendency to seek out novelty and challenges, to extend and exercise one's capacities, to explore, and to learn ... [representing a] natural inclination toward assimilation, mastery, spontaneous interest, and exploration" (p. 70). Thus, intrinsic motivation represents a set of important motives, such as the motive to explore, to master, and to satisfy curiosity. One possible alternative explanation of our findings is that people think that they more intrinsically motivated than others and therefore choose flexibility for themselves more than for others. However, the relationship between intrinsic motivation and flexibility is not obvious, and probably depends on the specific type of intrinsic motive. Someone who is motivated by the intrinsic desire to master a task, for example, seems likely to choose effective, rigid plans. We view the relationship between different types of motives and how people make plans as an interesting area for future research.

Agency and the "better-than-average" effect. One possibility is that people think flexible plans are more effective for themselves than for others, or that they can at least make a more flexible plan work for themselves, unlike others. People tend to believe that they are "better than average" on many things (see Alicke and Govorun [2005] for a review), including self-control and willpower (Komoski 2019). Therefore, they might think that they are better equipped to handle a flexible plan. Other people, with less self-control and agency, might need a rigid plan to succeed, whereas one's own self can have flexibility and still ultimately complete one's tasks. This account is consistent with work by Schroeder, Waytz, and Epley (2017) showing that people view paternalistic plans as more effective for others than for themselves.

While we do not exclude the possibility that the self/other gap in flexibility is multiply determined, we provide evidence that is consistent with our head/heart mechanism and is also not easily explained by an extreme version of an agency account. People think rigidity is *more* effective than flexibility for themselves (see pilot data), and people choose rigidity *more* often for themselves when efficacy and staying on track are salient (see Study 5). This suggests that they believe they need rigidity if they are to have the best chance at succeeding at their goals.

However, a more moderate version of this account could work in tandem with our proposed mechanism. One possibility is that people think rigid plans are more effective for both themselves and for others, but the efficacy difference between rigid and flexible plans is larger for others than for themselves. For example, rigidity might make me twice as likely to succeed, but make you three times as likely to succeed. In this case,

¹¹ In the pilot study reported in the introduction, we asked five items in total: a question about which plan was effective, which helped them stay on track, which plan was unpleasant, which plan they wanted to do, and which plan they thought they should do. People tended to say a rigid plan was what they should do (79%), but not as much what they would want to do (50%). This is consistent with the idea that "want"/"should" could also be a reasonable way to think about our findings.

people might be more willing to choose flexibility for themselves because they think the efficacy disadvantage is less extreme for themselves. Still, under this account there would need to be a reason why people would choose something less effective, which is where our proposed head/heart mechanism comes in. Many people want to choose flexibility because it sounds less unpleasant.

Inside view and outside view. Prior research shows that taking the “outside view” of a decision—thinking of a class of situations generally instead of the details of one’s situation specifically—leads people to make better decisions in domains like planning (Kahneman and Lovallo 1993). The “outside view” draws on different information (statistical and comparative) than the “inside view” (specifics of one case), which can help people better understand what is likely to succeed. We offer a different mechanism for why people plan differently for the self versus others: differences in following one’s heart versus one’s head. In our research, people understand which plan is more likely to lead to success, but they choose differently for themselves anyway. Nevertheless, both lines of research converge on a similar broader point, which is that stepping outside the specifics of one’s situation can lead to wiser choices.

Future Directions

This research has a number of potential future directions. One question is whether these self/other differences occur in other situations beyond creating plans for self-improvement goals. For example, people sometimes make plans for leisure activities, such as to get ice cream or to watch a movie. In these cases, there is also evidence that people think a more structured schedule is less appealing (Tonietto and Malkoc 2016). However, it is not as clear whether people think of a more structured, rigid schedule as more “effective,” or if efficacy is a concern that comes to mind in this context. Unlike the context of, for example, weight loss or saving money, it is unclear whether people worry about whether a plan to eat ice cream is more “effective.” It would be interesting to investigate whether there is a similar perceived trade-off between efficacy and appeal for plans for leisure, and whether there are similar self/other differences.

Another direction for future research might be to track goal progress and examine how our proposed nudges affect various outcomes beyond choice of plans. We assume rigid plans will improve goal completion based on prior work on the benefits of rigidity, but future research could test this assumption directly. Furthermore, future studies might assess how nudges to choose rigidity affect satisfaction and retention. Satisfaction could be higher after such a nudge, if more people completed their goal. It could also decrease, if people felt the experience was particularly unpleasant. Fleshing out the downstream consequences of plan choices on satisfaction, efficacy, and other outcomes is a worthwhile future direction for subsequent research.

Conclusion

The present research examines how people think about choosing flexibility in goal pursuit. This work shows that many people view flexibility as less effective but more appealing than more rigid options, and therefore choose flexibility more for themselves than for others. We know that making firm, structured plans to achieve our goals is good advice; now we just need to find a way to get ourselves to follow it.

Acknowledgments

The authors are grateful to Robyn LeBoeuf and the Consumer Behavior and Decision Science Lab at Washington University in St. Louis for their helpful comments and suggestions.

Associate Editor

Stephen Spiller


Declaration of Conflicting Interests


The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The author(s) received no financial support for the research, authorship, and/or publication of this article.

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