

perspectives

an artemis strategy group publication | SEPTEMBER 2009

This issue of **PERSPECTIVES** explores how the understanding of life orientations allows organizations to gain new insight on its customers or constituents that, in turn, helps crack a marketing or communications challenge.



a tale of two golfers:

LIFE ORIENTATIONS HELP ANSWER: WHAT ARE THEY THINKING?

What's a key difference between Tiger Woods and Roy McAvoy? Both excellent golfers, Roy is the teaching golf pro in the movie *Tin Cup*, played by Kevin Costner, who qualifies for the US Open, plays astoundingly well but falls short of winning it all on the very last hole. Going into that last hole with a lead, Roy attempts to drive a difficult shot across a large water hazard instead of playing it safe and taking a couple of shots to the green. His first effort goes into the water. Rather than take the penalty, and ignoring the advice of his caddy Romeo, he re-sets and sinks another into the water. Then another. And another. It's agonizing to watch; golfers especially get irritated watching this scene.

What was it that made Roy do what he did? "I hit it again because that shot was a defining moment," he told his friend and caddy, "and when a defining moment comes along, you define the moment or the moment defines you. If I had to do it to all over again, I'd still hit that shot."

**"SOMETIMES PAR IS GOOD
ENOUGH TO WIN."**

— Romeo, Roy's caddy

Despite the context—an unprecedented opportunity to win the US Open—Roy chooses to follow a pattern that is consistent with the rest of his life: to never play it safe; to hell with the consequences.

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Artemis Strategy Group is a research-powered brand strategy and communications firm. We help you identify ideas that transform the relationship your audience has with your organization, product, or issue. We provide you with ideas that make sense. **PERSPECTIVES** is designed to offer insight, a point of view and ideas to help organizations with brand and communications needs. Like our business, the topics often relate to the intersection of policy and marketing. If we stimulate your thinking, we appreciate hearing your views.

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Means end theory (Gutman, 1982) provides a powerful premise for developing a customer-focused communications strategy. In this framework, product attributes and their functional consequences are just the means to an end. The end is a personal need, goal, or value that reflects the perceptual orientation of the consumer and shows how he or she translates a seemingly inconsequential product into an object having deep personal relevance and importance.

From "Effectively Translating In-Depth Consumer Understanding Into Communications Strategy and Advertising Practice" by Thomas J. Reynolds, David B. Whitlark and Richard B. Wirthlin; in *Understanding Consumer Decision Making* edited by Thomas J. Reynolds and Jerry C. Olson. 2001

Contrast Roy's approach against that of Tiger Woods. One reason for Tiger's popularity is his bold style. Although he frequently is exceedingly aggressive with his drives—willing to take a risk here and there—he changes this pattern at the end of a tournament when he is in the lead. Because his orientation is to win, he adjusts his game as necessary and plays it safe if that's what it takes. Over his career Tiger has been tremendously successful protecting his lead going into the final round. (Note that Tiger is extremely successful at this strategy, not necessarily perfect. Tiger was undefeated, 14 – 0, when leading a major after 54 holes, until August 16, 2009, when he lost the PGA Championship title to a non-household name: Y.E. Yang. Tiger's strategy, dictated by his life orientation, was exactly what it always is; smart shot choices, sometimes conservative, sometimes bold to put him in position to make a lot of putts and win. This time he simply didn't sink the putts.)

Roy and Tiger both play golf with a passion. But Roy has a different life orientation, or set of personal values, than Tiger. Roy believes in going all out, regardless of circumstance; Tiger balances risks against outcomes.

The movie (which the non-golfers among us recommend) provides an excellent illustration of the concept of life orientation—the unique combination of personal values that drive a person's decisions—and how it influences decisions made about work, spending, voting, and other aspects of life.

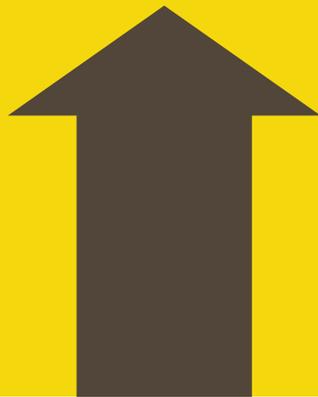
THE DRIVING FORCE IN DECISIONS

Almost every life decision, whether large or small, has both a rational and an emotional component to it. The rational component includes consciousness and consideration of all the tangible elements involved in a decision context, including the tangible benefits derived from a specific capability or outcome. The emotional component is the way that those outcomes or benefits make the decision maker feel. From these, research can derive one's personal values, which are higher order emotions. See chart page 3.

We refer to personal values as the ultimate motivating force because they are more deeply held, more stable over time, and can be shown to influence why people make other corollary life decisions. The usual way we look

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EXAMPLE OF HOW RATIONAL AND EMOTIONAL COMPONENTS LINK WHEN MAKING A DECISION TO GIVE TO A PHILANTHROPIC ORGANIZATION



VALUES:

peace of mind

EMOTIONS:

no worry/stress

BENEFITS:

secure in decision

ATTRIBUTES:

effective use of money

leadership management organized

at personal values is within the context of a specific decision. What are the personal values that link to the most important attributes and consequences involved in that specific situation? Quite a number of categories of life decisions have been studied, and we can identify some of the values most commonly evoked in various categories. Some examples:

- Social activity often evokes the personal value of "belonging"
- Financial issues often tie to the personal value that seeks "security"
- Work situations tend to stimulate a pair of personal values: "personal accomplishment" and "security"
- Health considerations usually include connection to values associated with "family"

- Political and policy choices tap into a broad array of personal values ranging from "world preservation" to "sanctity of life" to "self-esteem" and many others
- The act of giving links to its own array of values that includes "responsibility", "peace of mind", "compassion" and several others.

UNCOVERING LIFE ORIENTATIONS TO DEEPEN UNDERSTANDING

While every category of life decision tends to have to its own unique set of personal values that drive most people's decisions in that realm, we can gain additional insight by focusing more holistically on the individuals. Going back to Roy from

... some people are much more driven by a need for personal security than they are by a need for accomplishment ... the way they approach decisions about their jobs, their purchases, their living choices and their politics.

Tin Cup, can we understand more about Roy's approach to life by looking at his golf game?

Not surprisingly, we confirm that most of us have our own unique configuration of personal values – we call this our life orientation – with a specific weight in many kinds of decisions.

To take a prominent example, some people are much more driven by a need for personal security than they are by a need for accomplishment, and we can see that reflected in the way they approach decisions about their jobs, their purchases, their living choices and their politics.

The concept of life orientation is a fresh way of examining audiences – or re-examining existing research – to look for clues for how and why individuals are, or aren't, making critical decisions. Here are some key applications we've found:

1. Calibrating point of entry: Sometimes gaining a perspective on life orientation in a specific context helps calibrate the right level to gear communication. We were involved with a government effort in which there was a desire to motivate a group of people to adopt a convenient new financially-related technology. But we

found that many in this audience were financially unsophisticated and did not understand or trust the technology. Even more important, the combination of physical circumstances and deep emotional drivers associated with the conditions that made them part of this government program simply outweighed the significance of the technology's main function. By uncovering the group's life orientations we concluded that the issue was being framed far too narrowly for this group, and that a broad-gauged approach was going to be more effective. A communications and product development strategy that ties directly to the target audiences' underlying life motivations was developed.

2. Targeting a specific life orientation cluster: One data point is convincing. There is special insight in a motivational segmentation approach that simply cannot be gleaned from traditional demographic or even attitudinal segmentations alone. Motivational segmentation goes beyond many other approaches in showing more explicitly the ways in which personal values link with the tangible elements in life.

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...those who are most successful continue to emphasize their core values but take account of new forces affecting decisions.

Eliciting life orientation as we do in the context of specific purchase or decision situations gives us a frame of reference for applying broad gauge segment information to such specific decisions. Here's one example.

In a recent study of shopping behavior our goal was to understand what drives purchase decisions for a consumable good in a specific retail channel to help our client's channel strategy against a heavily entrenched competitor. We used our techniques for uncovering situational motivations and the linkages that drive them. We learned a lot about these consumers: why they shop the channel so frequently, why they prefer their brand, why some are open to switching brands. All good stuff.

By adding an examination of overarching life orientations to this investigation, we found a handle for applying what we learned in a more systematic fashion, enabling us to identify and characterize three distinct shopping styles, or three groups that were motivated in very different ways. This insight is helping our client to hone their communications campaigns, promotions,

and in-store signage with the goal of capturing a larger market share.

3. Creating clusters of services:
Sometimes knowing your customers' life orientations creates a bridge between the current decision being examined and other related product/issue areas, creating extension opportunities.

Our client, a technology retailer, identified three need states that its most sought-after audiences experience frequently. The goal was to uncover consumers' motivations when they experience these need states so the retailer could hone its communications messages to reflect a deep understanding of the audience, to use this knowledge to identify new product/service opportunities, and to help train customer-facing employees.

We took a deep dive into all three need states and identified how consumers experience them and how each can be explicitly linked to the retailer and its products. Then we looked for life orientations that are shared among the three need states and found one common thread that wove its way through all need states: the need for control.

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“the fundamental objective of a means-end communications strategy is to position products, services, corporations, political candidates, and public issues by exploiting our understanding of the personal value structures through which consumers perceive the world.”

Our clients’ products and services help its customers develop, regain or maintain control, a critical lever in their lives. By combining this powerful insight with the detail about each individual need state the retailer is using this knowledge to create a strategic framework for communications and service programs.

4. Adapting to economic changes:

Anyone familiar with the Great Depression, either directly or through relatives, can think of ways in which that event seared a generation.

Part of the power of life orientations in understanding motivations is the stability of personal values. But major life events caused by health, family or even economic changes can change the orientation of individuals — altering the triggers that evoke those values or even modifying the relative importance of specific values. And every once in a long while, such as with the Great Depression, there can be a change that is so dramatic it affects the life orientations of large numbers of people simultaneously. This may be happening now in the U.S. and globally as a result of the recession. Large numbers of people have changed their behavior and possibly their life orientations.

How are marketing communicators reacting to this potentially seismic change? We’ve been asking that question, and looking for examples. The common answer we’ve found is that those who are most successful continue to emphasize their core values but take account of new forces affecting decisions. One example comes from the government technology program mentioned earlier.

Understanding the critical importance of personal control to those largely unbanked individuals, and recognizing that the recent financial crisis has only deepened mistrust of financial institutions, the program team introduced a special new cash card specifically geared to the orientations of these important constituents. It helped them maintain their feeling of control over their finances while not requiring a banking relationship. It transformed their views while giving many a new financial flexibility.

Consumer icon Dunkin’ Donuts provides another recent example with its successful “you ‘kin do it” campaign. The light-hearted campaign marries three understandings: trust always matters; in tough times, people look

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“One time in my life I know the safe play to hit and I still can’t make myself do it.”

— Roy McAvoy

more for safety and comfort; and optimism sells. The campaign taps a nostalgic note, realizing that “everyone has a donut story.” It acknowledges what people are going through and empathizes with the audience in a light-hearted way. The core idea of the campaign is that times are tough, people are working hard, and people need a treat. They capitalize on the trust equity of the company. As Vice President of Consumer Engagement Cynthia Ashworth says, “Mine your brand’s emotional reason for being and work it.”

APPLYING THE DEEP UNDERSTANDING OF LIFE ORIENTATIONS

The elucidation of life orientation in a specific business context is a powerful tool because it builds on an understanding of core personal motivations. Coupled with other primary research, analysis of life orientations provide unique insights for businesses, non-profits, agencies and politicians alike. How so? To quote our research colleagues Reynolds, Whitlark and Wirthlin, “the fundamental objective of a means-end communications strategy is to position products, services, corporations, political candidates,

and public issues by exploiting our understanding of the personal value structures through which consumers perceive the world.”

Going back to our friend Roy McAvoy, communications messages and images that truly resonate with Roy and others like him might tap into their risk-taking orientation to life. For those with other orientations, messages would necessarily differ. In commerce, policy and politics, such knowledge of an audience can fuel effective marketing strategies by evoking the audience’s most important decision-making drivers, making targeted communication strategies a hole in one.