

Summary of Values Based Segmentation (Values Modes)

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Rather than dividing people by categories such as age, sex, geographic origin, race or social class, values based segmentation divides them by how they are motivated. It is a 'psycho-demographic' system. The model referred to here is owned by CDSM Cultural Dynamics Strategy and Marketing www.cultdyn.co.uk. The insights it gives make it easier to change or reinforce someone's behaviour, whether at an individual or group level.

1. VBS In Summary

In any society there are three 'types' of people who can be identified by their different underlying psychological needs:

Settlers: with an unmet need for safety, security, identity or belonging

Prospectors: with an unmet need for esteem of others or self-esteem

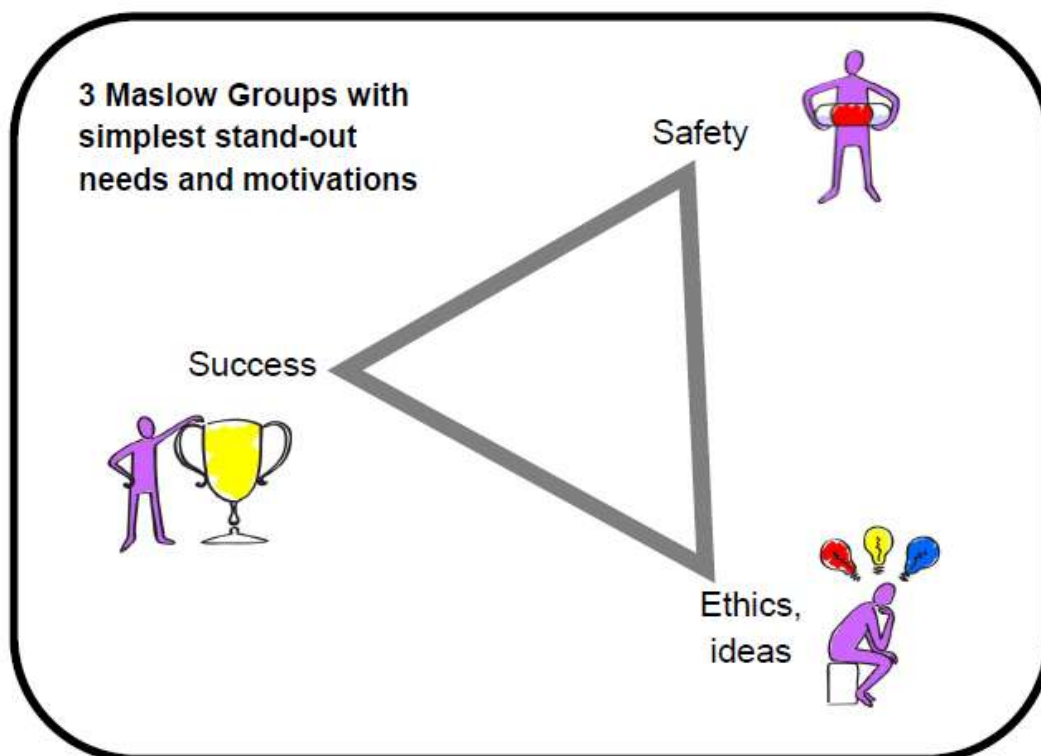
Pioneers: with an unmet need for exploring ethics, new ideas and connecting action to values

(These groups are explored more fully in the book [*What Makes People Tick: The Three Hidden Worlds of Settlers, Prospectors and Pioneers*](#) by Chris Rose. The website for the model is www.cultdyn.co.uk and there are numerous papers using this form of values segmentation at www.campaignstrategy.org)

Values Based Segmentation (VBS) identifies people in this way rather than say by age, sex, lifestyle, life stage, race, class or wealth. These 'Maslowian' needs (from Maslow's Hierarchy of Needs) are unconscious, and strongly determine the way in which people make sense of the world, and respond to offers or asks, including campaigns, fund-raising etc..

The different unmet needs lead people to have different sets of attitudes and beliefs, which strongly influence their ways of seeing the world and what 'makes sense', and what 'feels right'. As a result, these influence behaviours, and because people tend to adopt opinions consistent with what they are doing and it also influences opinion.

The simplest application of VBS is to recognize that these people exist ('Maslow Groups') and try to match communications to them as audiences, by tailoring your offer or ask in terms of messenger, context and rewards, so that it resonates with their attitudes and beliefs, rather than working against them.



The *primary orientations* of these groups are:

Settlers - unmet need for security, safety, identity and belonging. Keep things small, local, avoid risk. Have a low sense of self-agency: that is, they do not believe they can change the world, rather it changes them. They tend to seek a lead from those in authority, including rules based on morality given by authority. Maslow called them sustenance or security-driven.

Prospectors: have an unmet need for success, the esteem of others, then self esteem. Try to acquire and display symbols of success. Maslow called them outer-directed as they look outwards to others to see whether or not they are achieving the esteem of others.

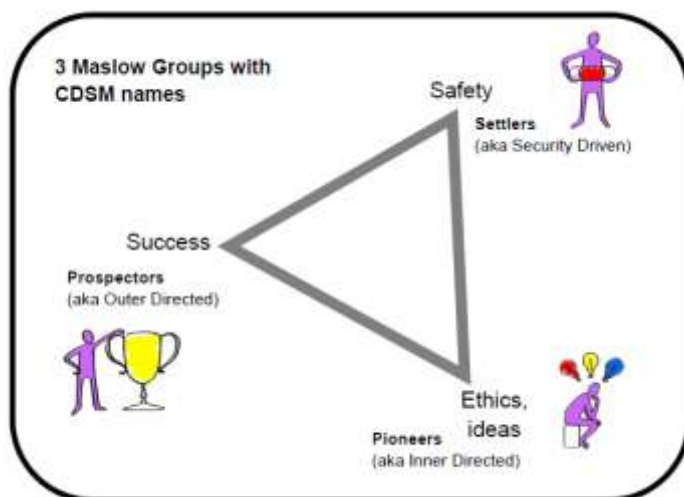
Pioneers: need to connect actions with values, explore ideas, experiment and innovate. Not traditional or conformist and like questions and complexity. Like to make their own networks and debate issues. Maslow called them inner directed as they look within themselves to decide right and wrong (ethics – own judgements).

Consequently the *way they 'judge' or relate* to a campaign or other offers or asks are fundamentally different, for example:

Settlers: can it make me / my country/ organisation/ family safe? Does authority say it is the right thing to do (rules)? Is it tradition? Does it help reinforce my identity within the group?

Prospectors: Can it make me / my country/ organisation look good, be recognized as better or best, it is successful, can it make me materially better off? Is it fun, enjoyable? Is it the right answer?

Pioneers: Is it ethically the right thing to do? Is it asking the right question? It is just, global, benevolent, innovative? Does it increase self-choice? Does it help me connect, make a difference?



Matching offers and asks to Settlers, Prospectors or Pioneers is a bit like tailoring communication so that the round peg is offered to the round hole, the square peg to the square hole and the triangular peg to the triangular hole. Although communications efforts can try to force the wrong match, it will not work for long, and will generate opposition. People sometimes do things against the pull of their unconscious values, but they will resist, try to avoid it, and, if that is not possible, cease the behaviour as soon as an opportunity arises.



Settler

Prospector

Pioneer

Campaigns

Because Pioneers have met the need for esteem of others felt by Prospectors, and are no longer conformist like Settlers, they are the most willing to experiment (as they are less fearful of change or failure). Coupled with their interest in ideas (rather than stuff) and ethics, Pioneers therefore tend to dominate 'ethical' and 'change' organisations. The most common problem campaign groups have with values is that Pioneers try to project or enforce their ideas and way of thinking at Settlers and Prospectors.

Campaign or other offers/asks for Settlers and Prospectors therefore need to look and feel very different from those that work best for Pioneers. In general, neither Settlers nor Prospectors want to engage with controversy, including 'issues', and do not want to lead change. A conventional NGO type of campaign ask

or 'journey' is unlikely to work for most of them. There are however many strategies that can be used to engage such groups and help win campaigns.

So most change-campaigns tend to be Pioneer dominated and although it is not the only source of opposition, they can easily get trapped in a stand-off with groups/people that have different or opposed values. There is evidence for example that this has happened on climate in some countries.

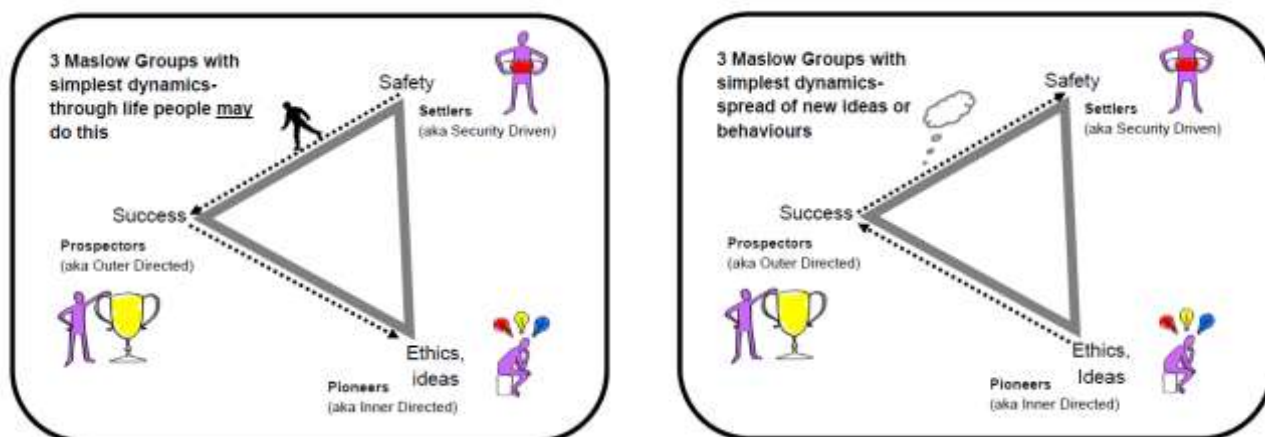
Some campaigns will attract large numbers of Settlers (eg those to 'protect identity') and tend to be anti-change; while others may attract many Prospectors (eg those to protect an interest, eg property values) but 'campaigning' is primarily a Pioneer idea and activity.

It is important to note:

- Numerous studies have shown that campaigns for change, especially global/ ethical campaigns, are mostly run by Pioneers and framed in their terms
- These same campaigns overwhelmingly attract Pioneers but are largely ignored or avoided by Settlers and Prospectors, even though many of them share the *aims* of the projects
- Opposition to these campaigns and calls for change put in ethical/global terms mainly comes from Prospectors and Settlers (eg on climate)
- Pioneers are seen by the media and politicians etc as the 'usual suspects'
- The most basic default strategic deficit is therefore lack of support from Prospectors and Settlers
- Gaining active support from Settlers is possible but often difficult – the usual objective should be a signal of acceptance. (In very locally-framed campaigns Pioneers can form an alliance with Settlers relatively easily, although Pioneers will tend to need to act as leaders. It is often much harder for Prospectors to form such an alliance with Settlers).
- Gaining active support from Prospectors is for various reasons, usually more important, and easier, so long as the ask/offer is framed in their terms, and the rewards of the behaviour match their needs
- VBS can help inform fund-raising and brand campaign strategies and design communications but cannot replace the need for all aspects of strategic and tactical campaign planning, in order to identify key audiences. Its main value is then in better motivating those audiences.

Dynamics

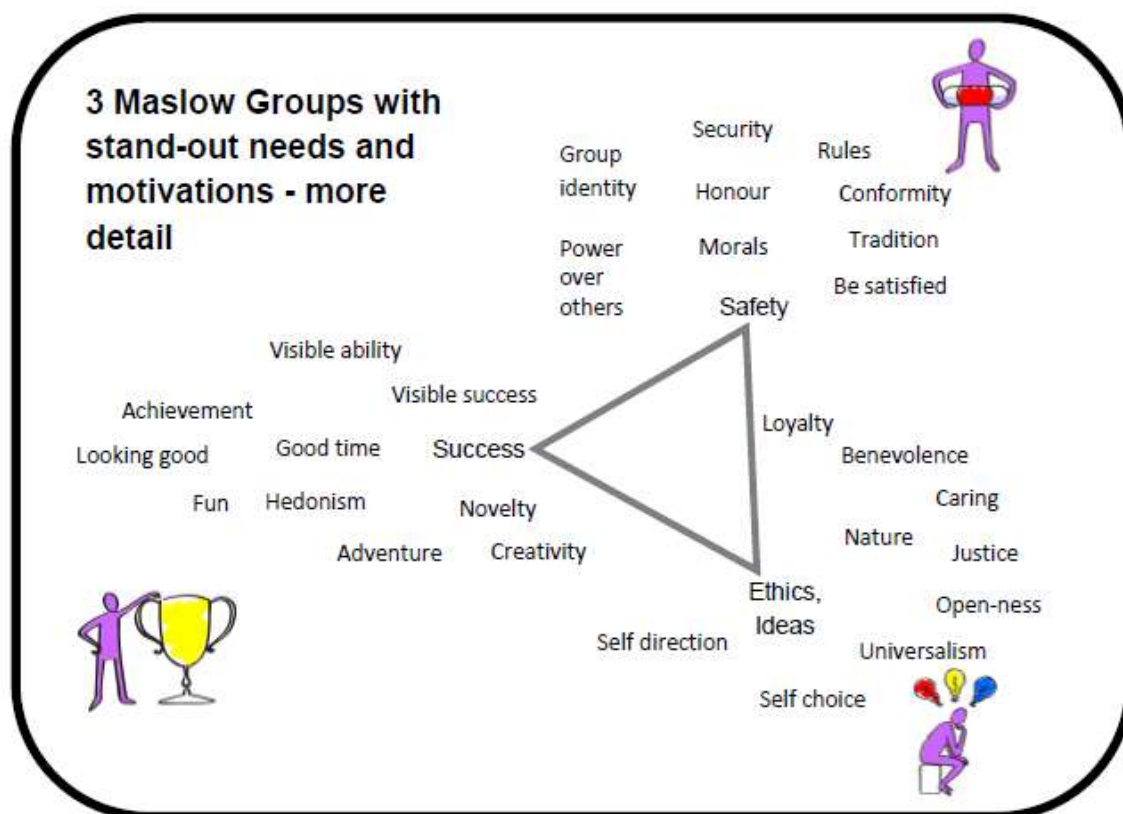
Values surveys by CDSM and other researchers over several decades, have confirmed Maslow's original theory that people can move from being Settlers (security driven), to Prospectors (outer directed), to Pioneers (inner directed) [below diagram, left]. It is thought that everyone starts out as a childhood Settler and if they fully meet the needs of safety, security, identity and belonging, they then develop a dominant need for esteem (Prospector). If that need is fully met, they become a Pioneer. This means that as social conditions have gradually improved in developed countries, the number of Settlers has declined, and the size of the other groups increased. The relative proportions vary from country to country.



Because Pioneers will experiment they are always the source of novel behaviours or ideas. Change therefore starts with Pioneers, and if it seems associated with success it may spread (by a process of emulation). If it begins to look 'normal' then it may spread (by norming) to Settlers (diagram above, right). This change dynamic can be used in designing campaigns and understanding social currents of change. The spread of new behaviours can be much faster than the gradual movement of individuals through their life. This, and the great difficulty in creating personal experiences which enable a person to meet basic needs, means it is far more effective to match communications to values than to try and 'change people'.

Planning for Settlers, Prospectors and Pioneers is the base level of VBS. For high value targets and projects and in commercial marketing, etc. CDSM uses a more detailed breakdown into 12 distinct Values Modes, four within each Maslow Group. The Main Groups can be 'taught' in immersion seminars over one or two days in which you 'become' Settlers, Prospectors and Pioneers. After that most people can begin to use these insights by 'dead reckoning'. If surveys are used to determine the profile of countries and /or target audiences, the chances of success are increased, and if propositions/ offers/ asks are developed using values-segmented qualitative research (eg in focus groups), the communication can be fine-tuned and enriched to "really work" for specific groups, even individuals.

Below is a 'ready-reckoner' template that could be used to brainstorm of design 'values tuned' campaign strategies or tactics or communications offers/asks at a basic VBS level. This draws on the much more detailed content of the CDSM model and international values studies it has been calibrated with:



You can therefore take any specific behaviour (eg attend a meeting, pay money for something, vote, make a travel choice) and design it so that it generates emotional rewards in terms of the top right (Settler), or left (Prospector) or bottom right (Pioneer). As some of these are antagonistic values, it is best to try and develop separate asks/offers, and present them in different contexts, although if people want to 'agree' they will strongly self-select (ie. chose the option that works for them, feels 'right').

You can also 'populate' a 'narrative' or argument so that it includes reference to all three (eg "X is a good thing because it helps make us safe, enables people to succeed, and is the ethical thing to do"). This however has serious limitations because of what happens once a discussion starts (values differentiation develops). It may even lead to a 'logjam of violent agreement' where people agree on what should happen but not how it should happen, and that then leads to inaction.

VBS has been used by many organisations for strategic planning, in sales, marketing, fundraising, team development and management training, campaigns, advertising and behaviour change.

Engagement and Mobilisation

Settlers, Prospectors and Pioneers need to be approached differently in terms of engagement and mobilisation:

Settlers - groups

Best engaged through a group they are already involved in, so that the engagement and messengers recognize and utilise existing sources of authority. It is something for 'us', that 'we' are doing (together). 'Authority' here is *de facto* authority, which could be from a family, or 'gang', or respected local figure or other leader, who may or may not also be the 'formal' authority figure eg an official, an elected representative, a religious leader. The test is whether he or she is respected and listened to – the "top dog", who enforces "our rules".

In practice this means that the most practical approach is usually to use channels, contexts and messengers with positive established relationships to individual Settlers. These may take years to forge and so it will, in general, be impractical for an ethical campaign group to appear as a new messenger or source and establish such a relationship, though it can be recommended/ endorsed by an existing Settler authority.

The offer/ask should preferably reinforce or increase or emphasise safety, security, identity, belonging, be uncomplicated, rational/fact based, if possible traditional or respectful of tradition, preferably reference the past and the familiar in a positive way, enable people to reduce risk and uncertainty, and defend against external threats. Use a face to face approach.

Prospectors – activities

Best engaged through activities that are preferably non-controversial, discrete, uncomplicated, bounded, and above all, enable people undertaking the activity to be in some way successful, look good, and feel good because they gain the esteem of others or self esteem. The activities therefore need to be fun, as immediate as possible and rewarding in terms of credit, winning, succeeding and being positively received.

In practice this may mean that the best way to engage Prospectors with a 'campaign' is through fundraising, or social events and activities which are aligned with the purpose of the campaign, or through specific behaviours which can be 'rewarded' with the approval of others. The most effective channels are often brands. Preferred actions include shopping/ purchasing.

The offer/ask should if possible be optimistic, can-do rather than don't-do, and involve making something the best or better. Be forward (future) oriented and cut through complexity. Offers/asks can be local, regional, national or global, and should express individual independence. Can involve consumption of 'experiences' if not wholly novel.

Pioneers - issues

Best engaged through issues and the discussion of ideas, and acting on (actualisation of) values. Enable people to explore and make connections, create new communications networks, meet new people, create new/novel concepts or experiences. Acting on values can include engaging in controversy (eg protest), doing different, being the first, making the right world/condition now, and acting on grounds of ethics.

Pioneers can be asked to take a lead.

Do's and Don'ts

Positives for Settlers:

Taking or keeping control.
 Introducing rules where they are needed or upholding rules and staying within them.
 Keeping away new or foreign threats; reducing risk of any type (social, financial, physical etc). Being with the people you know, and people like you.
 Doing what's normal – what the majority do, or what the majority of your group do.
 Standing up for your community.
 Taking care of your family.
 Doing your duty.
 Playing your part without complaint.
 Looking after kith and kin.
 Making sure the basics get done: survival, getting by, being healthy, having enough food and a decent place to live.
 Saving lives.
 Giving children a traditional upbringing.
 Being modest and accepting your lot but with an occasional treat.
 Staying with what works – familiar, tried and tested brands, practices, associations, services and systems.
 Remaining loyal to those who've helped or looked after you and yours.
 Not trying to change what can't be changed, or trying to fix what isn't broken.
 Sticking with the proven ways and learning the lessons of the past.

Positives for Prospectors:

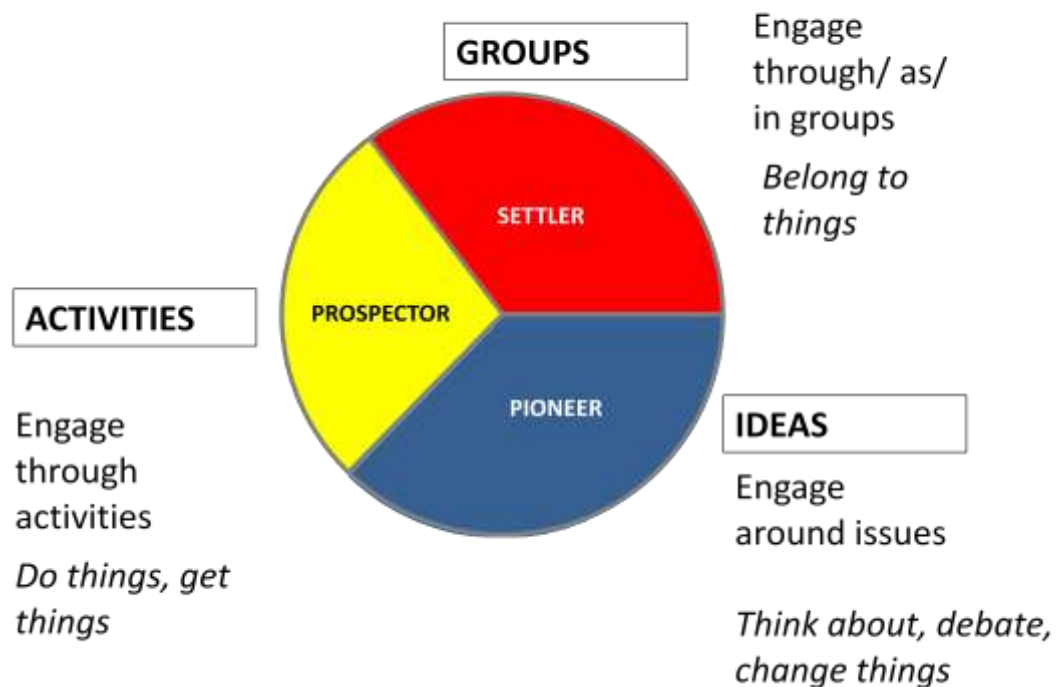
Being successful and being seen to be – socially and materially.
 Having fun, having a good time, enjoying yourself.
 Getting the right stuff, going shopping and buying what you want.
 Having the latest things, following fashion.
 Keeping up with new trends and developments.
 Looking and feeling your best.
 Seeking the best and better for yourself and your friends and family.
 Bettering yourself, getting ahead.
 Being a winner.
 Trying something a bit different.
 Enjoying sensation.
 Following and sharing in celebrity.
 Not waiting, finding shortcuts, ways to get what you want by bending the rules.
 Making things bigger and better – maximising.
 Looking to the future.

Positives for Pioneers:

Living ethically and exploring new connections.
 Connecting with new and different people.
 Discovering and sharing new ideas and new ways: innovating, experimenting.
 Questioning things and asking better questions.

Caring for the environment and for others – from local to global.
 Finding the best overall outcomes, and doing your own thing.
 Making your own choices and direction.
 Being at one with life as it is but also finding ways to improve it.
 Being creative and seeking justice.
 Helping children fulfil themselves.
 Blending or sampling the new and the traditional but finding what's authentic.
 Finding the optimal way to live in the present.

VBS – Engagement, rule of thumb



Ends