

Developmental relationship marketing (connecting messages with mind: an empathetic marketing system)

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The marketing revolution

“The 1990s are not proving a good decade for marketing.” Thus began a recent article by Peter Doyle (1995) in *European Journal of Marketing*. Kevin Clancy and Robert Shulman (1991), former heads of Yankelovich Clancy Shulman, wrote in *The Marketing Revolution* there is a marketing revolution coming “because failure is self-evident and everybody – stockholders, directors, CEOs, customers, the government – is angry because marketing, which should be driving business and marketing, does not work”.

Jag Sheth, head of Emory University’s Center for Relationship Marketing, and Raj Sisodia, head of George Mason University’s Executive MBA program, recently stated in *The Journal of Marketing*, Sheth and Sisodia (1995) that while manufacturing costs have declined from about 50 percent to 30 percent since the 1940s, and G & A costs from 30 percent to 20 percent, marketing costs have risen from 20 percent to about 50 percent.

A 1995 McKinsey report, (Sheth and Sisodia, 1995) declared: “Doubts are surfacing about the very basis of contemporary marketing. What has gone wrong? Have marketers been traveling the wrong road to get to their destination of a better understanding of consumers and achieving more effective marketing?” Arguably, yes.

To many, relationship marketing will prove to be a big part of the solution to marketing’s present woes. However, with some fundamental shifts in perspective, relationship marketing (RM) becomes even nearer the panacea many see it to be (see Table I).

The three requisites of enduring customer relationships

In times past, knowledge of customers as individuals brought honor to vendor and customer alike – and made sales. It was a matter of buying-and-selling activities being conducted amid mutual respect. But this approach mostly went away with the rise of mass production and mass marketing. However, with the aid of sophisticated new information technologies,

- **Transaction (“push”) marketing:** marketing that tries to get consumers to bend to marketers’ wills (consumers are *objects* to be *targeted – en masse*).
- **Relationship (“pull”) marketing:** marketing in which marketers strive to bend to consumers’ wills (consumers are subjects to be *served – individually*).
- **Developmental relationship marketing (DRM):** advanced form of relationship marketing that draws on principles of human development to project consumers’ needs, motivations and responses to marketing messages. In DRM, consumers are subjects *empathetically* served.

Table I. Key definitions of marketing

Relationship marketing a big part of the solution?

relationships are said to be back in. But hold on. Enduring relationships that are satisfying to all parties depend on dialogues. Despite extensive literature devoted to RM, hardly any covers the human issues involved in dialogues. For dialogues not to ring hollow and be fully satisfying, three requisites must be fulfilled:

- (1) *Conversational reciprocity*: each party allows the other to condition its responses: “I influence you; you influence me.”
- (2) *Reciprocal empathy*: each party reaches out to identify with and understand the other party’s circumstances, feelings and motives.
- (3) *Reciprocal vulnerability*: both sides in a relationship let down their guards to some level that remains safe and comfortable yet allows information to flow and trust to build.

Marketers face big challenges in getting enough knowledge of consumers to satisfy these three requisites of lasting, satisfying relationships. How, for example, can a marketer develop empathy with a customer he’s never met or seen? The marketer can guess. He can generalize results of surveys, interviews and focus groups – hoping he doesn’t misapply his generalizations. Or he can dig deeper than consumers’ self-reports and learn more about how human brains and minds work at varying stages of life. This will give the marketer better chances of connecting with the deeper, most compelling drivers of consumer behaviour than traditional consumer research offers.

Moving from control of consumers to collaboration with consumers

The underlying rational theme of transaction marketing (TM) is “control of consumers’ minds based on objective knowledge about them derived from research and database recordings of their attributes and purchases”. This objective information is often used to fashion consumer behavior models used to predict marketplace outcomes. By “objectifying” consumers into “cause and effect” models, little allowance is made for consumers’ self-determination. In effect, they are simply seen as stimulus-response automatons. The curious thing about all this is that the objectivity of these models often are adulterated by consumers’ subjective self-reports made in both scientific and non-scientific samplings, as well as from interviews and focus groups. The purpose of most consumer research is to develop the profile of the “average” consumer within some usually preconceived set of parameters. With profiles of “average” consumers in hand, marketers proceed to develop “average-style” messages, usually in the form of monologues focused on product features and benefits which commonly are direct in approach, assertive and intended to overpower consumers’ will in favor of serving the marketer’s will.

Objective information

Relationship marketing is more humanistic

In RM, with attention shifted toward consumers as individuals, some of the elements of TM are retained, but increased attention is paid to individual customer preferences (as may be indicated in a database recording of past purchases) and less attention paid to traditional quantitative studies. Overall, RM is more humanistic: it is more favorable toward dialogs with consumers. RM depends less on power-driven push dynamics and more on carefully managed pull dynamics in which consumers are invited to influence the marketing process by injecting their individual preferences into the process. Mass customization is a fine example of this process at work. The overall theme of RM is collaboration with consumers as opposed to control of consumer (see Table II).

Tactical issues	Yesterday's mode (transaction marketing)	Today's mode (relationship marketing)
Primary target	Mass/niche	Individuals
Data focus	Consumers' self-reports	Databases
Behavior models	Normative (average)	Single consumer
Communications style	Monolog	Dialog (limited)
✓ <i>Message focus</i>	• <i>Features/benefits</i>	<i>Features/benefits</i>
✓ <i>Message style</i>	• <i>Direct</i>	<i>Direct</i>
✓ <i>Message tone</i>	• <i>Assertive</i>	<i>Sympathetic</i>
✓ <i>Message thrust</i>	• <i>Power</i>	<i>Control</i>

Table II. The evolution of marketing

Why probabilistic assessments of consumers make more sense

Both TM and RM tend to be exclusive and prescriptive. In contrast, developmental relationship marketing (DRM) is inclusive and suggestive systems. DRM draws on both TM and RM, integrating concepts and approaches used in both systems, integrating them within a larger matrix of activity than either TM or RM generally operate (see Table III). For example, while proponents of RM downplay the mass marketing approaches of TM, mass marketing approaches are acknowledged to have great value in DRM where the initial objective is to get as many consumers "into the tent" as possible before switching to RM approaches.

DRM is as much a philosophy as a method. It espouses a world view of consumers that may at first appear to be contradictory, but in fact world views of consumers in TM, and to a large extent in RM, run contrary to critical realities in how consumers react to marketing messages and make their choices in the marketplace.

A matter of semantics?

In short, like the weather consumer behavior cannot be predicted – at least in the sense that knowledge of initial conditions and known effects of given stimuli will dependably yield expected results. Researchers and marketers would do well to do as meteorologists have done and shift from predictive to probabilistic assessments of consumer behavior. The differences may seem to some to be mainly a matter of semantics, but they are far more than that. Billiard players rely on predictive assessments because the laws of motion at billiard table level are immutable, thus deterministic. However, there is nothing immutable about human behavior. If that were true, there would be no free will, and predictions of consumer behavior would be easy to make.

Tactical issues	Early stage relationship marketing	Advanced stage (DRM) relationship marketing
Targets	Individuals	Mass/niche/individuals
Data focus	Databases	Behavior theory, consumer self-reports, databases
Behavior models	Single consumer	Generic/single consumer
Communications style	Dialog (limited)	Full dialog
✓ <i>Message focus</i>	• <i>Features/benefits</i>	<i>Experiential</i>
✓ <i>Message style</i>	• <i>Direct</i>	<i>Conditional</i>
✓ <i>Message tone</i>	• <i>Sympathetic</i>	<i>Empathetic</i>
✓ <i>Message thrust</i>	• <i>Control</i>	<i>Vulnerable</i>

Table III. The evolution of developmental relationship marketing

Objective and subjective indicators

That not being so, a framework that allows accurate probabilistic assessments of consumer behavior will prove to be more valuable than the stimulus-response orientation of traditional research. DRM provides such a framework.

Relationship marketing calls for a new definition of marketing:

- *Old definition:*
 - exchange relationships involving goods and services in exchange for payment – this definition is object-oriented: consumers being the object (of attention) on whom to “push” products.
- *New definition:*
 - product-related information processing – this definition is subject-oriented: the consumer being the subject (of attention) to be served.

Traditional definitions of marketing lack salience

The shift toward proactive integration of consumers’ preferences in marketing programs makes classical definitions of marketing obsolete because of their objectivity.

The DRM definition of marketing as “product-related information processing” acknowledges that marketing is as much subjective on the marketers’ side of the supply-demand equation as it is on the consumers’ side.

Marketing decisions are a blend of objective indicators (e.g., statistical data, product features) and subjective indicators (experienced-rooted feelings). When conflict arises in between objective indicators and subjective (feelings-based) indicators, subjective feelings generally have the greater weight because of how information is processed.

Recent brain research indicates that internal responses favor feelings over reason. If a person experiencing inner conflict between reason and feelings has the final word on a matter, the likely decision will be rooted in feelings irrespective of what objective indicators are saying. Consumers make decisions in the same manner.

Objectivity in marketing, whether on the supply or the demand side, overlays subjectivity – all objective notions rest on subjective foundations. Objectivity marks the cognitive (thinking) style used to analyze both marketing and buying decision possibilities. Subjectivity marks the cognitive style used to determine relevance of a matter to a person and to conclude pending decisions. The reason, as indicated by the research of Antonio Damasio, head of neurology at the University of Iowa, and author of *Descartes’ Error* which describes his research, is that decisions in which we have a personal stake in the outcome are rooted in changes in body states that arouse emotions. Emotions thus are biological in origin. Feelings, which are psychological in origin, are our attempt to determine what emotions (changes in body states) are indicating.

The new definition makes the human mind and brain central to marketing:

- Marketing occurs in the theater of the mind:
 - Marketers draw on research, their own experiences and personal biases to create marketing messages.
 - Consumers draw on marketers’ messages, their own experiences and biases to make decisions.
- Traditional marketing is product-focussed.

Deep influences of classical science

The constructs of consumer behavior

- Relationship marketing is consumer-focussed.
- DRM is mind/brain focussed.

DRM focusses on the mind – where marketing really takes place

Constant insistence in business on making decisions objectively, reflects the deep influences of classical science on our culture. Classical science regards truth as an attribute that exists independent of the human mind; thus, what cannot be shown to exist independent of human participation is not verifiable as truth.

For more than a century, psychology – a field with intimate connections to marketing – has failed its adherents’ dreams of achieving the broad credibility enjoyed by classical science. The reason for this is transparent. Reality for each of us exists in fashion that is unique to our personality; thus, no reality mentally exists independent of any perceiver. When people agree something is true, they reflect harmony, not duplication, in their perceptions. We call this harmony consensus. When consensus is broadly held, it is likely to be regarded as objective truth by those who believe the consensus. But one generation’s truth often becomes fiction to next generation.

Marketers and researchers, who usually do not have time or the disposition for such philosophic musings, generally operate according to constructs of consumer behavior that suffer from broad generalizations of consumer behavior that often are overridden in the marketplace by the idiosyncrasies of individual consumer behavior acted out *en masse*. This generates perennial dissatisfaction with researchers’ predictions of consumer behavior. It is notable that researchers are still trying to answer the same questions researchers had half a century ago. Given this, marketers have tended to focus on product attributes which is easier to contemplate in measurable terms than is human behavior.

DRM offers marketers the opportunity to take a new and more solidly paved road to success because that road winds through the labyrinths of consumers’ mind/brain complexes where marketing really takes place.

Consumers’ behavior begins in the brain ... not in the mind

The primary function of marketing is surely to persuade minds to take actions; yet oddly, few marketers know much about how the mind – and the brain – work. B-schools leave the mind mostly to psychology departments (see Figure 1). But mental functions extend beyond the traditional

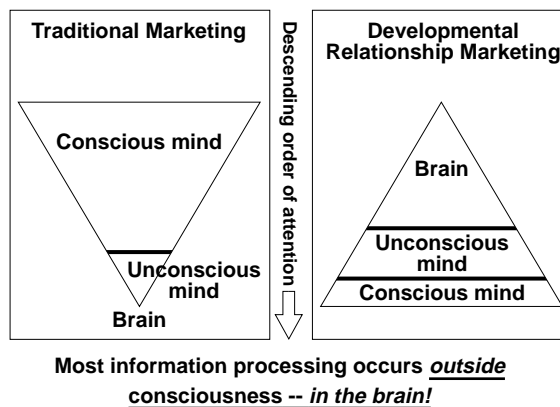


Figure 1. Marketing has been operating upside down

The conscious mind

boundaries even of psychology. All perceptions, thoughts and actions – as well as all motivations – have their origins in the brain, which few psychologists study.

While psychologists devote much thought to the unconscious mind, most researchers and marketers concentrate almost exclusively on the conscious mind. In doing so, they presume consumers have greater knowledge of their needs and motivations than justified by recent mind/brain research. As renown neurologist Richard Restak (1991) says: “We have reason to doubt that full awareness of our motives, drives, and other mental activities may be possible.”

DRM decreases the need for consumers’ error-prone testimonies because it draws on the body of growing knowledge about how needs arise in the brain and motivations form in the unconscious zones of the mind. These needs and the general character of motivations urging their satisfaction are remarkably similar among people who are at similar stages of psychosocial development.

Our world view depends on the cognitive lens through which we view it

Figure 2 demonstrates how we view reality.

World view is internally-based

Subjective-concrete cognitive style: World view is internally-based (and -biased). Everything is connected to everything else – the world is perceived as an extension of self in an undifferentiated continuum: no clear boundaries exist between reality and fantasy. This blurs or eliminates contradictions or anomalous conditions and is why belief in Santa Claus is not unreasonable to a child: reality and nonreality are part of the same continuum. Time is only dimly experienced in the child’s subjective-concrete style.

Objective cognitive style: World view is externally anchored: there is an objective world independent of self. The individual readily subordinates to social consensus, especially among peers. Reality is differentiated, seen in independent pieces with each piece sharply differentiated from every other piece. World views are crisply etched in black-and-white unambiguous truths and untruths that exist independent of the self. The components of reality can be abstracted into symbols whose meanings are determined by social consensus; for example, the laws of motion – incomprehensible to the

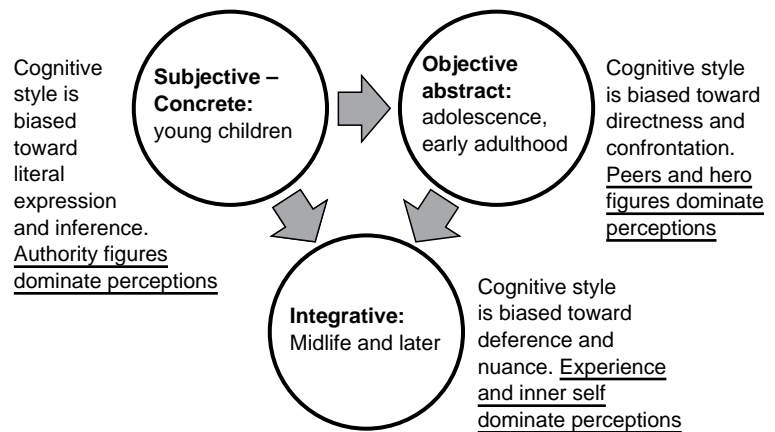


Figure 2. The lens through which we see reality changes across the life span, altering how we see it (excluding the sensor-motor stage of infancy)

juvenile subjective mind, can be represented by and understood through mathematical symbols that are understandable to the more highly developed objective mind.

Integrative cognitive style: World view reverts to an undifferentiated perspective, changing perceptions from a mosaic of black-and-white absolutes to shifting patterns that older people frequently describe as “seeing the world in shades of gray”. Meanings rather than being absolute depend on context (relationships). Reality becomes a web in which everything is connected. Subjective orientation increases with age, though objective abilities remain intact for use when a situation warrants objective analysis.

The conscious mind is last to know about happenings in external world

Marketers’ messages pass into the brain via the senses as packets of discreet information concerning shape, color, size, etc. (visual); tone, volume, sound frequency, etc. (auditory); and so on. These packets are integrated in the brain to create internal representations (images) of what the senses are “reading” in the external world. These images are compared with existing information in the brain to make them comprehensible in the conscious mind and to begin to determine relevance of the information to a person’s needs. Existing information includes innate behavioral traits (including instincts); data developed from prior experiences; and subjective responses based on a person’s internal value system and temperaments (see Figure 3).

Activating motivations

When a need exists, a marketer’s information can activate motivations urging satisfaction of the need. This takes place at unconscious levels in the mind/brain complex. As the motivation grows stronger, the unconscious mind feeds information back to the brain to receive further input concerning meaning and relevance, while at the same time, information begins feeding into the conscious mind, alerting it to what is taking place and informing it that a matter is developing that requires conscious-level action.

While this description of the flow of marketers’ information through the mind/brain complex is linear, the process actually unfolds in a highly complex circular fashion through a massive cascade of feedforward and feedbackward loopings. The time required for information to reach the conscious mind from the external world ranges from about 0.1 of a second to 0.9 of a second, depending on the type of sensory data – e.g., visual takes longer than aural –

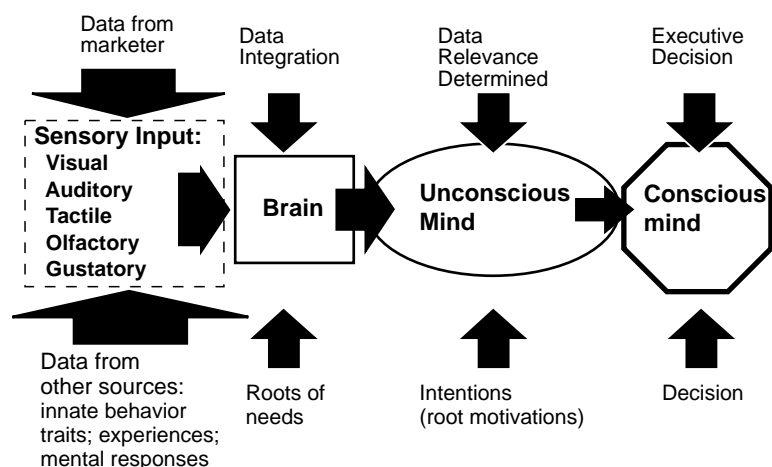


Figure 3. Pathways of marketers’ information through consumers’ mind/brain complexes

Breaking through “the clutter”

its urgency and its complexity, and depending on the novelty or familiarity of incoming information, novelty takes longer to process.

The real clutter marketers must contend with is in the mind/brain complex

Marketers often talk about the challenges of breaking through “the clutter” to get consumers’ attention. Of course, the “clutter” to which they are usually referring is the endless waves of marketing messages lapping at the shorelines of consumers’ minds. A more challenging pool of clutter flutters about in consumers’ mind/brain complexes.

It has been estimated that only about one-trillionth of the information falling on the surface of the eyes ever reaches consciousness – and that addresses just one of the five senses. The brain experiences major challenges in sorting out what is important amid all the incoming “clutter”. It must reduce the stream of incoming information to levels that are manageable by the conscious mind. What the conscious mind can handle is constrained by the limits of working memory. The capacity of working memory in comparison with the brain’s memory – like a computer’s RAM is in comparison with the computer’s hard disk – is quite small.

The brain works like a good staff would do in preparing information for action by a CEO. It sorts through untold volumes of information, rating it according to its importance to the CEO – in this case, the conscious mind. The brain conducts information triage to reduce information to what is most important to a person’s survival scenario.

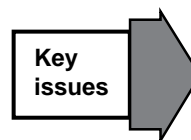
Thus, marketers’ primary challenge in creating and transmitting marketing messages is getting marketing information across in a way that is judged by the brain and preconscious mind as relevant to consumers’ survival scenarios.

Comfortable survival

Message success begins with identifying consumers’ survival needs

All behavior originates from some need relating to comfortable survival. Thus, given that all behavior is adaptive (survival-related), the first step in creating a marketing message should be identifying connections between a product and consumers’ survival scenarios (see Figure 4). Consumers cannot provide this information with the accuracy and completeness a marketer would want because none of us have certain, direct knowledge of our root needs and root motivations.

Creating messages that survive information triage



● All behavior is adaptive, i.e., related to some aspect of survival

● 1st step in creating marketing message: identify survival issues a product addresses

The real clutter marketers face is not in the marketplace but in the inner recesses of consumers’ minds which present new challenges in each season of life

Figure 4. The No. 1 challenge of marketing

The social self

Instead, marketers must access information that comes from other sources to get the information about consumers' needs and the motivations they covet. Three broad disciplines offer that information: brain science, cognitive psychology and human development psychology.

Brain science provides detailed information about the biological origins of needs and motivations. Cognitive psychology offers insight into the mental activities involved in needs awareness, motivations and development of decisions. Human development psychology can inform marketers about the changes that developmentally take place in needs, motivations and strategies and actions used to satisfy needs at different seasons of life.

How the seasons of life define our core psychosocial needs

In the spring of life, needs revolve around the initial identity formation, and acquiring basic physical, mental and psychosocial skills. Play is a principal means by which these developmental targets are met, whether it be in games, mimicry of adult roles and behavior, or intellectual modeling in school. Early on, children use authority figures and fictional characters as models for identity development. In adolescence, peers and heroes acceptable to peers serve that role. Passion for novelty and experimentation drives much of the learning that takes place in spring. In adolescence, novelty-seeking and experimentation lies at the root of much of the behavior that challenges authority.

In Summer, needs revolve mainly around the social self. Achieving social integration to aid goal achievement and validation of self is primary. Narcissistic, materialistic and productivity values are dominant influences because social attractiveness is enhanced by visually observable cues including signs of being a productive individual.

In Fall, needs shift toward a focus on the inner self. This is signaled by increased introspection, new concerns about one's mortality and, among many, a conscious search for new insights into the meaning of life. Peer influence declines as the materialistic and narcissistic values of earlier adult years ebb. Many begin thinking "It's time for me, now" and attempt to balance work (productivity) better with increased play.

During Winter, personal development reaches a climax stage as needs develop around the objective of finally making sense of life; achievement of peace with the world, friends, family – and self; and on developing strength to maintain a sense of well-being through a period often marked by serious challenges to health and life. Table IV highlights these points.

Season	Year	Survival focus
Spring: initial personal development	0-22±	Play (learning)
Summer: social/vocational development	18±-40±	Work (becoming <i>somebody</i>)
Fall: inner self/spiritual development	38±-60±	Work-play (search for meaning)
Winter: Climax of personal development	58± ?	Reflection (making sense of life)
1st half of life survival scenario focus: <i>needs of the social self</i>		
2nd half of life survival scenario focus: <i>needs of the inner self</i>		

Table IV. Survival scenarios by season of life

Lack of personal information

Basing marketing on statistical consumers invites marketing misfires

TM's traditionally greater focus on pushing product than serving consumers results in minimalist attention to human psychology. TM generally operates on the premise that products pushed into the marketplace to the accompaniment of heavy promotion will "on average" be successful. But the annual failure of over 80 percent of new products (according to Bill Gorman's *New Product News*, Clancy and Shulman (1991)) suggests otherwise. The most failure-prone faultline in TM is the statistical consumer – the hypothetical human who is composed of statistically-averaged attributes drawn from research.

The statistical consumer is even more problematic in RM because a focus on one consumer sharply lessens the value of averaging the attributes of many people and attributing them to a single person. Relationships that endure in a mutually satisfying fashion are characterized by mutual understanding based on mutual knowledge. While in the earlier stages of a relationship a good deal of speculation about each party's attributes is normal, soon each must have knowledge-based understanding of the other if the relationship has good prospects for lasting.

Except for information in databases captured in previous interactions with consumers, marketers usually know little about consumers on an individual basis. Even typical database information lacks vital information because information about the subjective aspects of the consumer is usually virtually nonexistent. For example, typical databases have no information about why consumers choose a particular product type or a particular product line – in other words, no information about consumers' motivations.

If a marketer is familiar with how needs, motivations and general actions taken by consumers to satisfy needs generally are largely shaped by the stage of development, and if the marketer knows how information is processed in the mind/brain complex in each life stage, the marketer will have a great amount of information about any individual consumer, even if there has not been any prior contact.

Marketing is applied psychology – a scheme of activity intended to persuade minds for commercial or social purposes:

- DRM shifts intelligence focus from consumer self-reports to basic principles of human behavior – the marketer becomes *an applied psychologist*.
- *DRM is behavior-driven*, not statistics-driven; consumer-driven, not product-driven.
- *Consumers drive marketing processes in DRM* – this requires more knowledge of behavior than traditional ("push") marketing does.

Traditional research lacks means to differentiate truth from untruth

Many of the data derived from traditional research about consumers can be analyzed by a person without formal knowledge of human behavior. However, much of what is concluded from such analysis may be erroneous because consumers often unwittingly commit error in their responses to researchers' questions. Without insight into how the human mind/brain complex processes information, the analyst of traditional research data will face difficulty in culling truth from untruth and identifying incomplete truths.

People use different sides of the brain

Recent brain research indicates that people tend to use different sides of the brain and different mental processes in responding to abstract questions than they use in real-life situations, such as when shopping. Thinking on abstract matters tends to be more objective and reflects a bias toward analytic reasoning; thinking on matters in a real-life environment tends to be more subjective and reflects a bias toward feelings.

Despite proponents of RM often stressing its consumer focus in comparison with TM's product focus, most RM nevertheless operates from a "push-the-product" perspective. This is because the modest knowledge marketers usually have of consumers' subjective behavior encourages marketers to continue focussing on product, which involves a greater constellation of measurable attributes and dynamics. Most people simply find greater comfort in orienting their activities to measurable knowns.

DRM provides marketers with a simple set of guidelines for determining consumers' developmentally originated needs, motivations and general courses of action involved in needs satisfaction. DRM also provides consumer behavior researchers with reference points that make it easier to judge the accuracy of consumers' responses to research questions.

Some aspect of survival

Knowledge of consumers' root motivations increases success potential

The assumption that all behavior has roots in some aspect of survival need is basic to DRM. In this context, "survival" is used in its broadest sense to include not simply physical survival, but all aspects of life that are germane to physical and psychological wellbeing.

Equally basic to DRM is the proposition that survival scenarios change and evolve over the course of life on a more or less predictable basis. With these two premises, DRM provides marketers with guidelines for styling promotional messages that are richly in tune with consumers' unique situations and life stage-based information processing styles.

A third basic premise of DRM is that all incoming information is subject to the brain's and unconscious mind's information triage process, which is designed to send to the conscious mind information most relevant to survival needs. DRM's scheme contains probabilistic assessments of information that are likely to be most salient to survival scenarios by stage of life.

When marketers know the nature of consumers' root motivations at various stages of personal development – irrespective of what consumers might say they are – messages can be designed for maximum impact on the brain's responses to incoming promotional information. This increases the chances of productive interface with consumers' deepest and most compelling motivations.

Inborn motivations

KUMe values – the DNA of behavior

Everyone knows that some motivations are inborn. An infant would not survive the first day of life, were this not so. Less appreciated is the role that inborn motivations play in adult behavior all through life, for there is a popular tendency to view behavior as mostly subject to conscious motivation. However, whatever one consciously decides about a matter, the roots of the decision lie in motivations that originate outside the fields of consciousness, in the brain and unconscious mind.

This is not to say that the root motivations of a 30-year-old are already formed in the behavioral structures of an infant. But the seeds of a 30-year-

The realms of physics
and chemistry

"The circle of life"

old's root motivations, awaiting to be developed, are part of the infant's genetic makeup, much as are the adult molars an infant will some day have. Thus, root motivations are DNA resident; they are reflected in a natal blueprint that anticipates and precircumscribes our behavior potential at various stages in our personal development.

No one can operate outside the genetically prescribed boundaries of their natal blueprints, This does not mean we lack self-determination. We simply are not omnipotent; there are limits to what we can do into which we are born. These limits are part of the unique, personal recipe of who we each are and will be: a unique copy of one. But our natal blueprints also anticipate basic need and motivational attributes across the life span that we share with every other human being at comparable stages in our personal development. These shared attributes are the structural basis of five key underlying motivating value systems (KUMe Values) from which originate all needs, motivations and general courses we follow in seeking needs satisfaction. KUMe Values, thus, can be regarded as the DNA of behavior.

The root motivations arise in five key underlying motivating values (KUMe values):

- *Key*: because they are essential to survival.
- *Underlying*: because they are biologically embedded and operate outside consciousness.
- *Motivating*: because they urge action to satisfy needs.

The character of needs follows a predictable course of change in life

The roots of all behavior are found in conditions and attributes that define us as humans. Actually, what might be called the tap root of consumer (human) behavior reaches deep into the realms of the physics and chemistry of matter and energy, for in terms of our temporal existence, our "beingness" originates in the particles and atoms that ultimately combine to form the DNA that bring the cells which make us. However, such consideration of the origins of behavior has more philosophic than practical value in marketing. It is sufficient to begin with the inborn marks of our humanness that give rise to our most basic needs and the root motivations underlying our behavior.

Merely being human predisposes much of our behavior, independently of what we consciously perceive and decide. For example, our social aspirations, including desires for human companionship grow out of our humanness – we might like other creatures as pets, but they cannot fulfill our deepest needs for human-to-human connections.

How we respond to these deepest needs and urges to satisfy them is subject to inborn traits taken from our family genes. We may have an artistic bent or other orientation that mirrors traits of our parents or grandparents and that predisposes how we perceive and approach various needs. Finally, we enter life as a copy of one, carrying generic marks of our humanness and family traits, but ultimately distinguished by a genetic recipe that is wholly unique. Following birth, the events we experience work to actualize the inborn potentialities formed by our humanness, family traits and unique genetic recipe. The potentials materialize in different ways around the circle of life, according to the needs of the season of life through which we are passing (see Figure 5). For example, the overarching importance of becoming socialized and developing stable social relationships in the first half of life

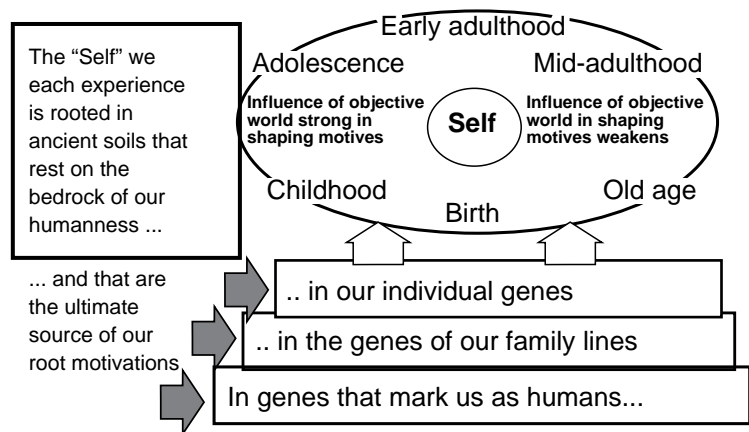


Figure 5. The “circle of life” – origins of motivations across the lifespan

results in different needs, motivations and behavior, than in the second half of life when needs of the inner-self become more influential.

Definitions of the five KUMe Value systems (see Table V)

I-Values constitute the most powerful motivating forces in life. They are the source of the will to live, mating desires, and images we wish to project into the external world. I-Values spawn our desire to extend our existence beyond temporal life through what we leave behind and, for many, through belief in life hereafter. Each of the other KUMe Value systems operate in service of identity, the “master” force of life.

R-Values are the source of needs, motivations and behavior that help us establish connections that we use, like a navigator uses beacons and channel markers, to orient ourselves and find grounding. We seek cues and clues in our relationships to guide us toward behavior that gains us social acceptance, a condition necessary to a sense of personal validity. Relationships also provide us with sources that help us fulfil our agendas. Relationships are both worldly and spiritual in nature, and are integral with our beliefs in both worldly and spiritual contexts.

P-Values define the overarching purposes of our lives. Our purposes revolve around securing our personal interests and welfare on one hand, and on promoting the interests and welfare of the group on the other. P-Values thus promote both egocentric and altruistic behavior.

A-Values are the source of needs, motivations and behavior concerning development of knowledge and skills used to accomplish the tasks that are laid out in our survival scenarios. A-Values are the primary source of yen for

KUMe value systems	Source of needs and motivations for:
• Identity (I-values)	Sense of self, self-presevation
• Relationships (R-values)	Orientation, resources and validation
• Purpose (P-values)	Focus of energies
• Adaptation (A-values)	Knowledge, skills
• Energy (E-values)	Health and wellbeing

Table V. The five systems of KUMe values

The sense of “oneness”

experimentation and novel experiences from which we often extract new lessons for life. A-Values also provide the foundations for habituated behavior, be it mannerisms we employ in social situations or functional skills we might bring to a job or some avocation pursuit.

E-Values concern physical and psychological health and wellbeing. *E-Values* promote behavior resulting in energy conservation and renewal. Play, change of pace, change of activity and rest and relaxation are major dimensions of *E-Value*-motivated behavior.

The “ecosystem” of the self

The “oneness” of self, the “I” that I am – the unique “copy of one” that we each sense ourselves to be forms the essence of each life. It is the foundation of consciousness. The sense of “oneness” we each have is the wellspring of continuous effort to develop and embellish the hallmarks of our identity. This we must do to get attention, to stand out, to be acknowledged by others. In the first half of life, we are prone to anxiety about how well we are succeeding at this, so we tend to exaggerate our demeanor. We make dramatic statements with wearing apparel, body adornments, the vehicles we drive, and in other metaphors of self-image. Later in life, with identity better resolved, we become less concerned about the impressions we make on others. We adopt a more conservative manner and are less concerned about making strong social statements in what we buy.

As marketers do with products, we define and present ourselves as a brand. Especially before midlife, we continuously search out and contrive new ways to project the defining attributes of the brand of “Me” to others. In midlife, we are more likely to adopt the more autonomous attitude: “Take me as I am.” The young are prone to saying this, but ceaselessly tinker with who they are. The mature become more accepting of themselves, whether out of resignation or conviction. Interestingly, this seems to increase their ability to accept others. The mature of mind become less judgmental, more forgiving.

Identity values (*I-Values*) form the central force of our existence. They influence the relationships we enter into, shape our purposes, establish our adaptation needs and strategies and determine how we manage our energy conservation and restoration activities (see Figure 6).

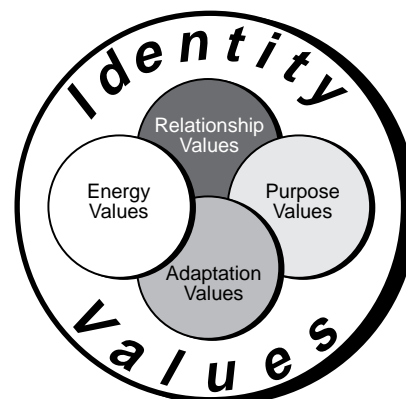


Figure 6. *I-values* flow from the core of the self to influence the operation of all other *KUMe* values

Represents our needs

Thus it is that key underlying motivating values which represent our needs, and urge us to seek their satisfaction, operate as a kind of personal ecosystem in which each KUMe Value system interacts with and supports each of the others. No KUMe Value system is more important than the others. Without the wholesome functioning of one, none can function in a manner that well serves the total self.

How KUMe Values activate motivations across the life span

KUMe Values operate in an interplay between biological and psychological forces to promote behavior appropriate to the needs and motivations of given stages of development.

Social development dominates life’s first half, resulting in different motivational influences than in the second half of life when inner-self becomes more assertive. The social focus in life’s first half reflects an objective bias in world view (except in childhood). The inner-self focus in later life carries a subjective bias.

Tension between bipolar forces

Root motivations arise from tensions between bipolar forces in each KUMe Value system, analogous to an electric motor’s armature being “motivated” by tensions between two electromagnetic poles. Behavior is dominated by one pole or the other in each half of life: objective pole in the first half; subjective pole in the second half (Figure 7).

I-Values promote subordination of self in life’s first half to facilitate learning and social integration. In midlife, with social development essentially complete, autonomy increases. Internal disorder often arises in early midlife, as the inner self begins to strive for dominance over the social self. This contributes to what is often called “a midlife crisis.”

R-Values promote behavior that is heavily marked by narcissistic and materialistic values in the first half of life. A person tends to view relationships in terms in self-serving terms. But, as midlife approaches, regard for relationships becomes less self-serving, less worldly, and become more experiential and spiritual in quality.

P-Values tend to promote self-interest in life’s first half, altruistic interests in the second half. The first serves self-preservation, the second serves preservation of the group.

Novelty enlivens curiosity

A-Values promote novelty-seeking in life’s first half to facilitate learning. Novelty enlivens curiosity and encourages the individual to experiment with life situations. As midlife arrives, desire for novelty usually ebbs because the individual now has an abundant supply of stored knowledge. In the second

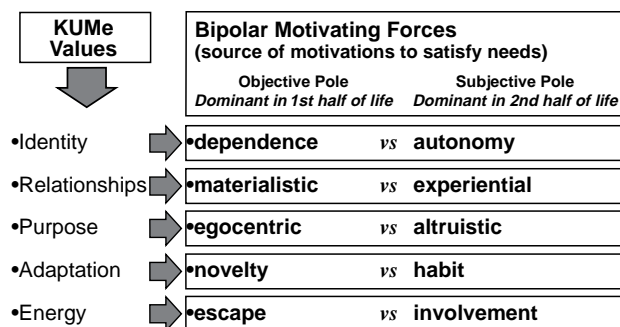


Figure 7. How KUMe values activate motivations

half of life, novelty serves less to provide basic learning experiences than to be a source of stimulating experiences to help maintain a sense of vitality. Habit begins playing an increasing role in behavior. This is apparent in the commonly stated aspirations of older people to pursue a simpler existence. Pursuit of novelty tends to complicate existence; following the well-worn paths of habit simplifies life.

E-Values, which promote health and wellbeing, encourage behavior in the first half of life that brings escape from constraints imposed by subordinating to the needs and desires of others, in both personal and vocational life. As autonomy increases in midlife, desire for escape ebbs.

Conventional “life stage” marketing models are not really such

DRM is the first consumer behavior model based on physical and psychosocial development across the life span. While many of the empirically-derived data used in developing DRM have been available to marketers for some time, relatively few of them have influenced consumer research and marketing activities. The major reason for this is the lack of in-depth knowledge researchers and marketers generally have of the workings of the human brain and mind.

Most information never reaches marketing students

Notwithstanding some attention in academe paid to consumer behavior in the context of formal studies in psychology, some of the most salient information never reaches marketing students. For example, while it is clearly apparent to everyone that needs of young adults tend to be different in many regards from those of middle-aged adults, there is probably no business or marketing curriculum in the nation that addresses the role of human development in defining human needs and motivations at various stages of life.

Probably one big reason psychology in general has had scant influence on marketing activities is the historic lack of a broad consensus on a viable and practical model of human motivations. This has the effect of elevating untutored opinions to a near equal status with empirical research when marketing decisions are being made.

DRM’s treatment of “hidden” or root motivations and their origins, gives marketers for the first time a kind of “commonsense” practical foundation for projecting consumers’ needs, motivations and world views that does not depend on consumers’ often dubious self-reports on such matters.

The difference between life stage and life event marketing models

The primary objective of consumer research is to develop models of consumer behavior that facilitate accurate predictions of outcomes based on a scheme of cause-and-effect hypotheses and findings. This objective was the driving force behind the development of consumer segmentation theories and practices. The Holy Grail in these efforts is a consistently dependable framework that lets researchers and marketers assign consumers to different categories (typologies), according to consumers’ demographic and psychographic profiles. After decades in pursuit of the Holy Grail, no one has found it.

Life stage models

More recently, marketers have been devoting attention to a new scheme for predicting consumer behavior: life stage models. In reality, however, these are not life stage models in any sense of the term “life stage” as used in behavioral science. More accurately, these are “life event” models. They do trigger events – events such as college graduations, household formation,

Identity-serving behavior

Meta values

birth of children, empty nester status and retirement, which tend to “trigger” new personal and household expenditures. But these events do not predict which brands people will buy.

Users of “life event” models ultimately have had to return to conventional research to determine what brands a person will select when a trigger event gives rise to a need and how the consumer will make his/her decision (see Figure 8).

Consumers make decisions to serve their idealized self-images

The products and services consumers select are metaphors of who those consumers are. They make most of their their lifestyle purchases in accordance with Ogilvy’s Principle: “Consumers tend to buy products that project images of who they want to be, not who they are.”

The DRM model provides marketers guidelines for assessing on a probabilistic basis the idealized images consumers are likely to have at various times across the life span. For example, the identity-serving behavior of young consumers inevitably reflects strong narcissistic and materialistic values. They usually will be more influenced by a product’s potential to generate social reinforcement than by some deep-seated internal-oriented need. Women’s willingness to wear uncomfortable panty hose and heels is a classic example of people’s willingness to endure discomfort if the end result is generating a desired response among others.

While the precise choices consumers make tend to reflect their idealized individuality, general choices are made in satisfaction of generic needs that arise during a given stage of life. It is the generic character of these needs that render them generally quite predictable, not only as to product type, but also to product style.

Meta needs become more determinative with increased maturity

In the first half of life, consumers’ decisions tend to be more tightly focused on product attributes (to serve practical needs) than generally true in the second half of life. To a great extent, the attributes of products which have strong social status meaning, such as a car, are evaluated for image-projection value as well as functional value. Image-projection is a low grade meta value. Meta values are values consumers associate a product with that are not directly related to the product’s functioning. Any working car will meet transportation needs, but only certain models will meet a given person’s image-projection needs.

There also are high-grade meta values (and needs). High-grade meta values reflect ethical and moral values. High-grade meta values tend to play a stronger role in consumers’ decisions in the second half of life.

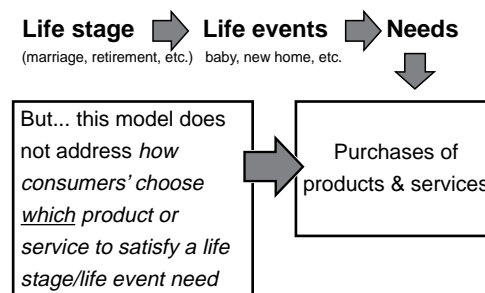


Figure 8. Conventional “life stage” marketing

Older people – more influenced by meta needs?

Meta needs can involve such behavior tendencies as buying products from companies that are good corporate citizens. Young consumers may ostensibly have the same values, but in reality be serving more egocentric self-interests to “be IN” in terms of a given social group. This is not to say that younger consumers cannot be selfless, but rather to say their motives tend to have stronger egocentric foundations than is true for mature consumers.

Meta needs are not as strongly related to specific products as practical needs are. In other words, a person’s desire to fulfill altruistic motivations does not need a specific product to do so, unlike the case when image-projection desires of a consumer will cause him/her to choose, say, a certain model car.

Because meta needs can be satisfied across a wide range of products, they represent cross-product line competition, especially for businesses selling to consumers in their second half of life when meta values tend to have a stronger influence on consumer behavior.

Understanding meta needs is key to connecting with consumers

The more discretionary a product purchase is to a consumer, the stronger role meta needs play in a purchase. For example, medicines generally have low meta need value because they tend to be nondiscretionary. On the other hand, jewelry tends to have high meta need value because it is highly discretionary.

Product categories can have low meta need value when they are nondiscretionary or semi-discretionary products, but brands within such categories can have high meta need value. For example, bread might be considered a low meta need value product, but a particular brand that offers multiple grains in a low-fat recipe could have a relatively high meta need value for food category to a consumer concerned with health and appearance.

The older and more affluent a consumer is, the more discretionary their spending, hence the more their expenditures will be influenced by meta needs. For example, a retired person living quite comfortably in a home she has raised children and lived in for the past 20 years may not need to move. She sees an ad for a community targeting retirees that offers warmer weather than she gets at home and the opportunity for various recreational activities such as golf. Because she does not need a new home, the community whose ad she has just read must offer more than a floor plan in an attractive environment to get her to move. It must offer opportunities for her to satisfy a wide range of meta needs. These needs might include opportunities for artistic pursuits, volunteerism (to continue having a sense of self-worth), and perhaps new activity potentials for a recently retired husband who is having trouble finding meaning in a life without a career.

Table VI depicts some of the broad-category meta needs that a car purchase might involve. Ultimately, meta needs are unique to individuals and strongly influenced by their both their past experiences and their present stage of life. The design of product messages should begin with an assessment of the meta needs that might be satisfied by the product being offered, taking into account present life stage values and behavior proclivities.

A psychodynamical marketing model

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- Identity: self image issues
 - Relationships: social relationship issues
 - Centering: self vs. others issues
 - Adaptation: novelty vs. familiarity issues
 - Energy: play vs. utility issues

These issues finally decide the general directions of a consumer's choice of product

Table VI. The role of meta needs in the purchase of a car

DRM is a psychodynamical marketing model that anticipates developmental changes in consumer's needs, motivations, and the strategies they employ to meet needs. This makes it possible to better understand consumers, independent of traditional research.

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