

## The Twelve Values Modes – Part One

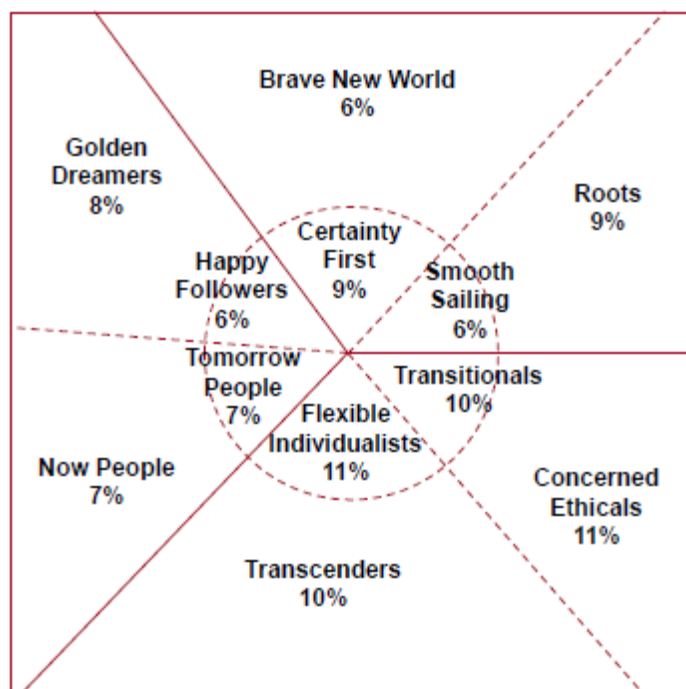
### A Campaign Strategy Paper by Chris Rose

This is the first of a series of three papers which will be published at [www.campaignstrategy.org](http://www.campaignstrategy.org) and draw on the experience of Campaign Strategy Ltd, CDSM and qualitative researchers KSBR ([www.ksbr.co.uk](http://www.ksbr.co.uk)) in using Values Modes in campaigns.

The Three Worlds of Settlers, Prospectors and Pioneers are described in some detail in the book [\*What Makes People Tick: The Three Hidden Worlds of Settlers, Prospectors and Pioneers\*](#). Some general guidelines for communicating with them are in a [paper](#) at [www.campaignstrategy.org](http://www.campaignstrategy.org). This paper describes the Values Modes identified in decades of research by Pat Dade and Les Higgins at Cultural Dynamics Strategy and Marketing (CDSM) [www.cultdyn.co.uk](http://www.cultdyn.co.uk). Before trying to understand or use these descriptions and maps you are recommended to read *What Makes People Tick* to explore the Three Worlds.

The CDSM model has 12 detailed segments within the three main Maslow Groups or Values Worlds, known as Values Modes. These can also be identified using the Schwartz Wheel and are a bit like distinct 'languages' within the three Values Worlds. They are more internally consistent and 'realistic' than the three large 'Maslow Groups' of Settlers, Prospectors and Pioneers.

The 2008 proportions for each Values Mode in the UK are shown below.



CDSM uses these shorthands to identify each VM or Values mode:

Security Driven or SD– Settler Modes:

Roots RT  
Smooth Sailor SS  
Brave New World BNW  
Certainty First CF

Outer Directed or OD – Prospector Modes:

Golden Dreamer GD  
Happy Follower HF  
Now Person NP  
Tomorrow Person TP

Inner Directed or ID – Pioneer Modes:

Transitional TS  
Concerned Ethical CE  
Flexible Individual FI  
Transcender TX

In theory, communicators might target all or any of these Values Modes individually. For some very personal purposes, for example in management applications or in relationships, that might be necessary. However for most campaign and public communications purposes it is not.

So when it comes to a specific campaign or objective, values analysis can be used to make communications efforts more cost-effective by targeting only key parts of a population.

In terms of values the six Values Modes in the centre are more ‘normal’ (ie closer to the population average) than those at the outside. This has two important consequences.

First, although the people in those Modes are still drawn in the same ‘direction’ as those that lie to their outside, the strength of the values pull is weaker. They are like pale shadows of the Modes that lie around the edge. The people at the outside are more ‘bothered’ about life and those at the inside are more ‘relaxed’ about it. In surveys of who votes<sup>1</sup> in the UK for example, all these ‘inside’ Modes have been found to be less likely to bother to vote than the Modes to their outside, and less likely to identify with any political party.

Second, people in these ‘central’ Modes find it easier to get along with/tolerate the views and behaviours of those with antagonistic values, and so in any debate or conversation they are more likely ‘agree’ with others, who they really don’t agree with ‘deep down’, just in order to ‘get along’. This means that they will say or do one thing in one circumstance but then end up doing something different (‘true to their values’) once left to their own devices, or, if they are later influenced by people with a stronger (outside Mode) version of their values. As a consequence their opinions are much muddier and their behaviours more contextual, and less

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<sup>1</sup> Voting in the UK is not compulsory

reliable than the Modes at the edge.

Because of these factors it is usually advisable not to target any of the central Values Modes in campaigns or communications strategies. Instead we usually just use the six most different, outside Modes as it is they who in any case will dominate and determine the framing and course of any debate, behaviour change, or social dispute. This also helps make communications exercises more cost effective, as 50% of any population lies in the central Modes and 50% at the outside.

So usually, we chose from

Roots (RT) and Brave New World (BNW) – Settlers

Golden Dreamers (GD) and Now People (NP) – Prospectors

Concerned Ethicals (CE) and Transcenders (TX) – Pioneers

And if we only took three, for example to use ‘formative research’ to develop campaign engagement mechanisms, or in surveys to investigate behaviours, attitudes and opinions across values groups, we would usually pick

Brave New World (BNW Settler)

Now People (NP Prospector)

Transcender (TX Pioneer)

BNWs are the most likely Settlers to have strong views and act on them in a Settler way. NPs are the Prospector VM which most influences the others, and are the “bellweather” of fashion and trends, and TXs are the leading-edge of all the VMs, the most likely to engage on campaign issues of a complex and global nature.

But in some cases specific campaign needs might mean targeting other VMs/combinations.

You can find your own VM by taking the online questionnaire at <http://www.cultdyn.co.uk/Process/indexAdagio.php>

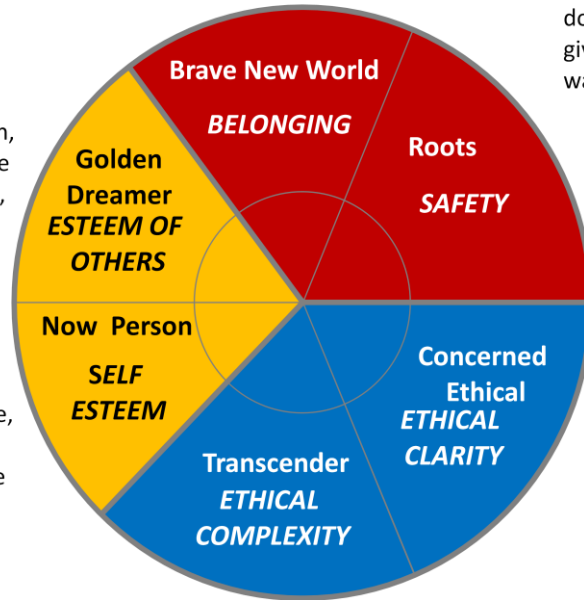
**Values Modes  
(showing edge  
Modes only)**

“It could be me !” - rewards, material wealth, visible success, recognize me, bling, lottery, ‘nice’ , recommendations

“I want the world and want it now !” – live to shop, designer, adventure, experiences, the latest stuff, party, fabulous, give nothing up

“Big ideas, small steps”  
Take care of us, control, set rules, keep it small, defend our rights, discipline

“Look after number one”  
Survival is success, accept your lot, keep to the rules, don’t rock the boat, just give me the facts, the old ways are best



“Be a better person to make the world a better place” – do things for the right reasons, rules to help people be better, justice, ethics, opinions

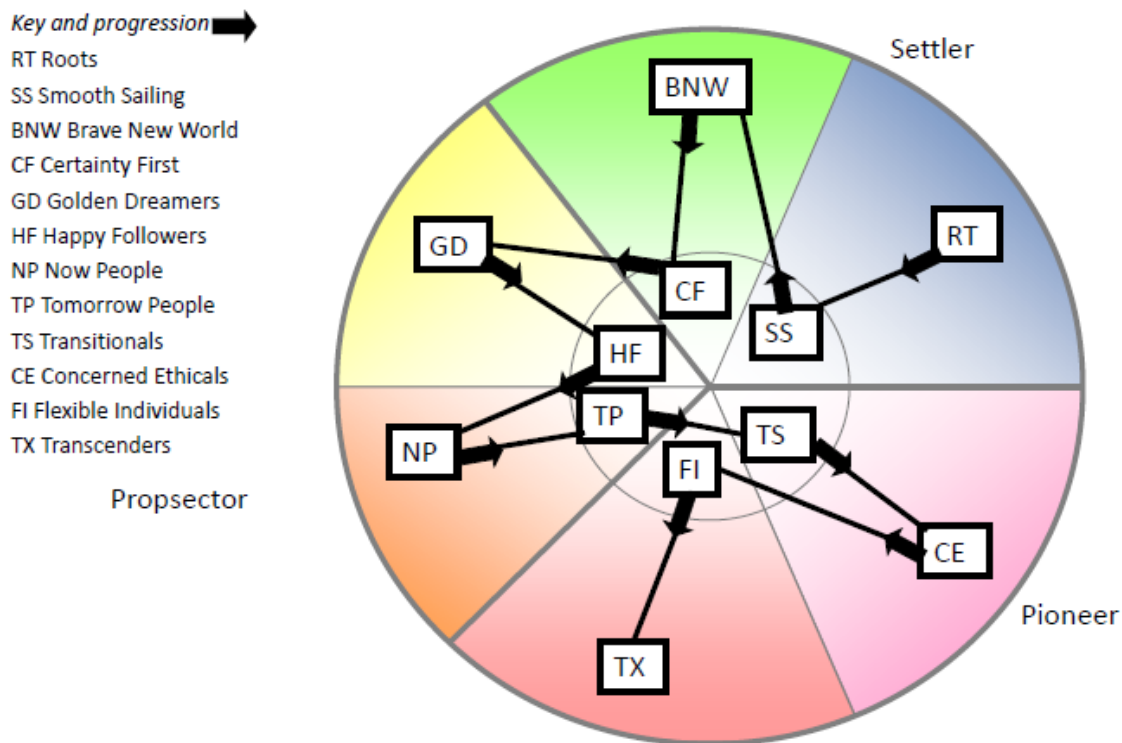
“Looking to see what I might find” – life is fun, try new things, intrigue, the unknown, complexity, possibility

Above – edge British Values Modes by percentage for 2008. (Proportions will vary from country to country.) The unmet needs driving their different attitudes and beliefs are shown in *ITALICS*. These are the Values Modes which it is most useful to use in planning campaign communications.

## Pen-Portraits of the 12 Values Modes<sup>2</sup>

These groups are shown in the sequence of ‘transitions’ which CDSM believes people follow in life if they move all the way from RT (the start) to TX (the terminal group in the model).

# Values Modes Transitions



Values Modes are the product of our life experience and that is a product of our social and physical environment, and the culture that has grown up around that, shaped by history, economics, politics, technology and on and on.

I've included 'Attribute Maps' for the 'edge' Values Modes.

Each Attribute represents the answers to 5 or 6 closely correlated questions from amongst the 1,000 used in the main CDSM survey. It is shown located on the map at its point of 'maximum espousal' or agreement. There are 100 Attributes, drawn from data generated by the 1,000 questions. The Attributes illustrated are those which most separate the data – ie most clearly reveal the extent of values differences.

<sup>2</sup> These descriptions are partly based on text for an as yet unpublished book on the 12 Values Modes and are mostly written in the first person.

The overlaps show where Modes share some Attributes which can help them have common points of view or interest, and sometimes easily 'get along', although once they depart from the overlap area they may strongly disagree.

It is the *patterns* of the data which show significant differences between Values Modes, ie looking at more than one Attribute at a time. This is what makes the Modes useful for planning communications, in management, in understanding relationships, pitching brands or propositions or plotting the dynamics of change in society.

The Attributes have been coloured as follows for each VM:

Red – very strong positive correlation

Orange – positive but less strong

White – same or similar to population average

Green – negative correlation

Blue - very strongly negative correlation

## **SETTLER VALUES MODES**

### ***Roots – look after number one***

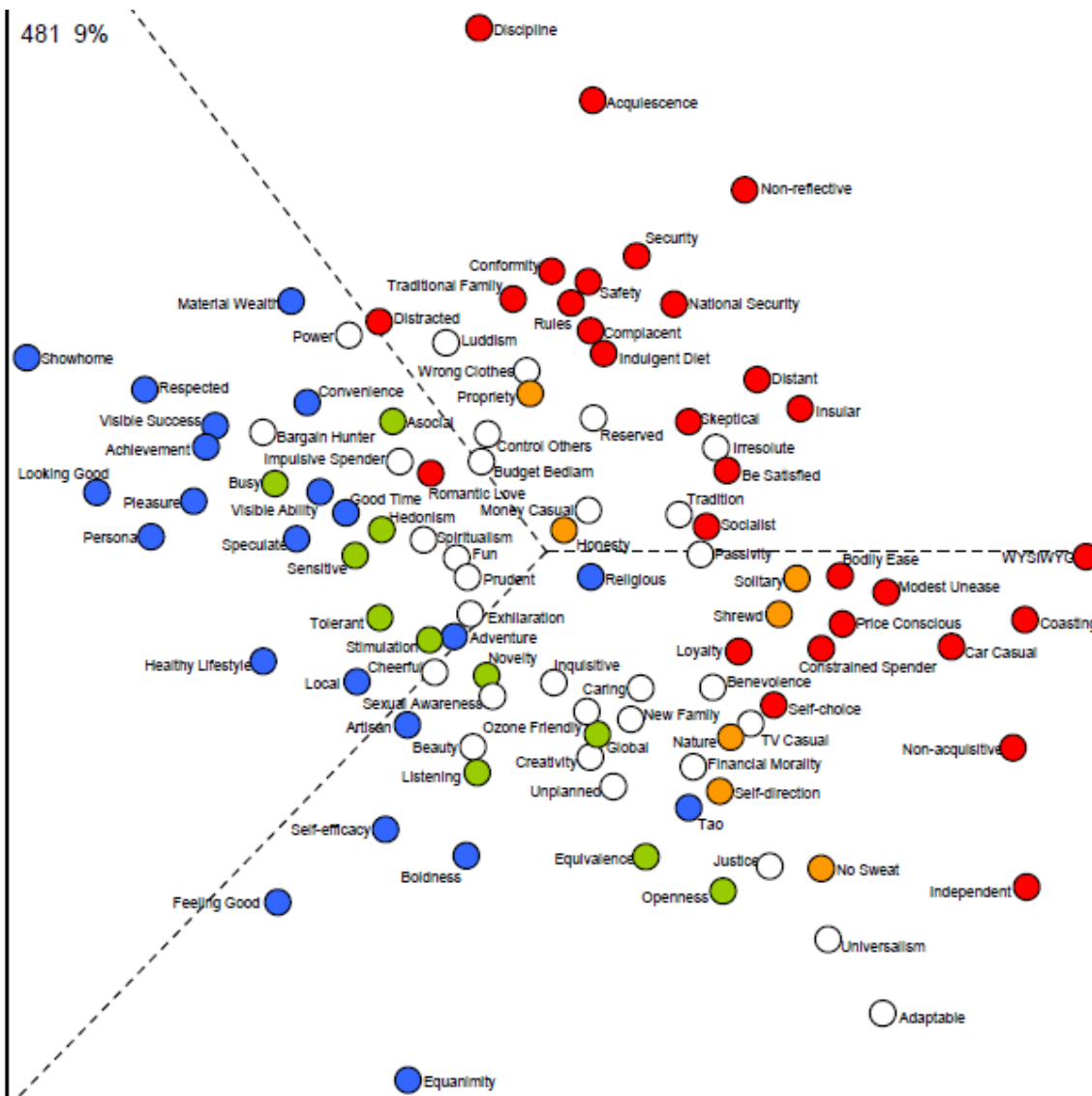
We're all in Roots or have been there. It's the first Values Mode. Enough of us stay there in adulthood for this to represent 9% of the British population as captured in the values surveys. The world of Roots is about basics and survival. A country constantly wracked by conflict, with little education and high infant mortality rates and short adult lives, will tend to have a lot of people with the Roots values. Their circumstances keep them in the place where they'd give the answers that the values model maps as 'Roots'.

The watchword of the Roots Values Mode is "look after number 1". Fundamentally, if we are Roots people, the world is threatening to us we must be strong to survive in the face of the odds. Survival is our mark of success. Although life is hard we probably feel very self-sufficient, which we have to be if we are to survive.

This does not mean that as Roots people we never do anything for others. Far from it. The stoic general who leads his men to death – keeping a stiff upper lip and "getting on with it" in spite of the negative emotions that arise when he thinks of his men that he has lead to death, is almost an archetype for our Roots form of manliness. The mother whose husband has died and endures a brutal life to raise her children is another example. Only when the grow up to her children realise what a wonder she was to stoically accept her lot in life in public, while making sure her children were loved and looked after in private.

There is strength in the steadfastness of the Roots Values Mode but there is also isolation from others. As Roots people we probably have comparatively low empathetic skills, as we spend much of our time attempting to control the world around us - even controlling our own desires. Roots folk are not self-reflective. Rationality is our main weapon of control. We keep the world

small by deliberately limiting the amount of new information coming in: by behaving and thinking in traditional ways, and being satisfied with the limited control we have.



*Roots Attributes(above)*

People in Roots underscore on Attributes like Equanimity – feeling at ease in most circumstances (which lies in the Pioneer area) while scoring strongly on “Rules”. That means they get upset when people break the “rules”, and they tend to obey rules even when no one can see them. They might stop at a ‘stop’ sign in the middle of nowhere, in the middle of the night. They score very low on “Equanimity”, a Pioneer-centred Attribute which means they are comfortable with for example, change in who lives around them.

You can see from the Roots ‘hot button’ Attributes that a proposition to engage a Roots person in the form of an invitation to attend a meeting with lots of people (Insular) whom you don’t know, to discuss an issue that needs thinking about (Non reflective), would not be a good idea.

However if it combined saving money (Price Conscious) with not having to think about it (made easy – Self Efficacy), and rejection of new ways (Luddism), and which came from an authoritative source in the form of rules (Discipline and Acquiescence) ... then that's a Roots sort of proposition.

Roots and other Settler Modes score strongly on the Attribute Non-Reflective, and have a form of rationality that is 'bounded'. This means that reality or rationality is not to do with the unknown or the difficult. 'Non-Reflective' indicates little desire to explore what may be 'good and bad' about yourself, and a desire to keep your world small and safe. People with such a bounded rationality know what 'makes sense' (and, by extension, what is safe) and anything that doesn't make sense is classified 'irrational' (and by definition unsafe). Logically this person will not be open to new versions of rationality and will be subconsciously threatened by anything that challenges the status quo of this orientation.

This typifies much of the Settler way of looking at life and their acceptance of what appears to others to be frequent contradiction between their 'group morality' and their personal behaviour. An example is anti-abortion and gun control correlations in the US. Why is this a contradiction? In the sense that it can at the same time be seen to be absolutely wrong to take an unborn life but absolutely right to take another life.

### **Smooth Sailing – *if it ain't broke, don't fix it***

For people entering this group, life just got better. They have grown out of the Roots Values Mode and loosened up. In Smooth Sailing we like routines of convenience - routines we don't have to think about. Rules are a big help in doing this. We tend to dislike new ideas and ways of thinking.

A 'worry' or 'issue' for others often doesn't really affect us. Smooth Sailing we are just trying to make the 'best of a bad lot in life' and often do this through the denial of bleakness in our existence: an attitude summed up in the old saying "you have to laugh, or you would cry". We have to look after ourselves first and put our own needs before others, whatever we may choose to say in a given situation. In our Values Mode we have an over-riding need to ensure the safety and maintenance of our lives in what we see as a harsh world.

In brief, a combination of confrontational individualism; a low need or desire for close emotional relationships (listening and hearing others at an emotional level); a low awareness of "society's" needs, and our own self-limited ambition creates a Smooth Sailing person who is still largely "self contained".

### **Brave New World – *Big ideas, small-steps***

The Brave New World Values Mode is quite different from the previous two. Now we are often attracted to big ideas yet we tend to act in small ways. As such we may well find ourselves mixing with the Pioneer Values Modes but we'll have a different take on how things should be done about these big ideas.



We dream, and we work hard to create a "better world" for ourselves and others. This is the very mindset that has created the modern world and the very concept of progress. As Settlers, we have a basic and gritty view of the world as it is. We are looking for answers that will give us control and, by extension, make us and our family safe. We see life is not as holistic but as a set of discrete situations; the smaller the better. For us, small equals controllable. We like rules.

We are prudent in our approach to money because that means safety, if we can have enough. So we are likely to be cautious savers, and attracted to reductions on brands we are familiar with or 'more for the same price' but this is unlikely to tempt us into rash over-spending of any sort. As Brave New Worlds we are more confident than we were in the previous two Values Modes. We know our rights and are often among the first to stand up for them, especially when this means defending our place and our people.

The Brave New World Values Mode is likely to be well represented in the ranks of schemes such as Neighbourhood Watch or Flood Wardens and among the first recruits in any war. Although all Settlers frequently experience the sensation that the world is not as 'it ought to be', Brave New Worlds are often those who speak out to say so.

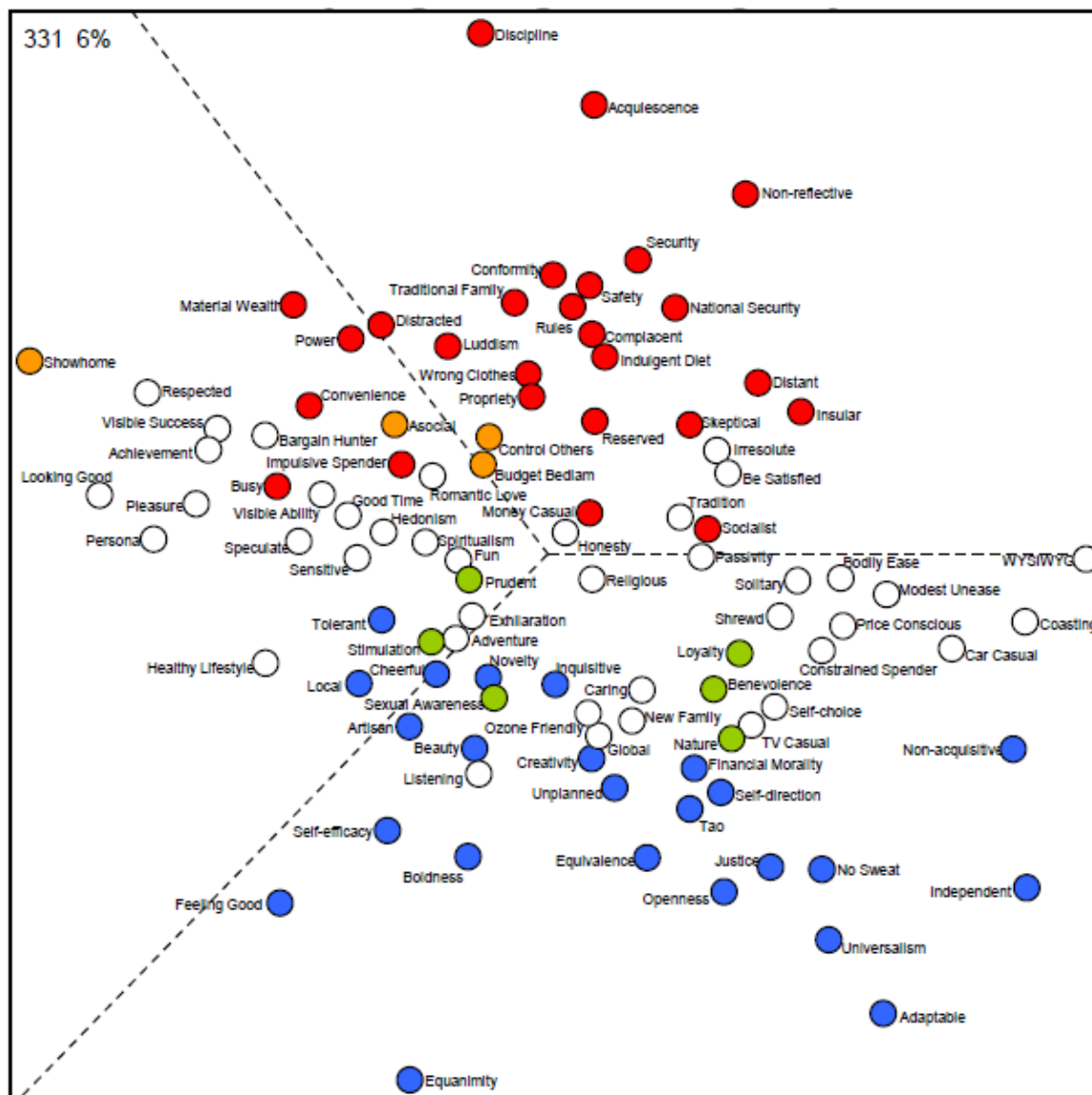
In recent years Brave New World (in the UK) has been one of the Values Modes scoring highest on 'eco fatalism': the conviction that we are all doomed but nothing can be done about – partly because we are all doomed because nothing will be done about it! As Brave New Worlds we are more actively "fatal" than the people in Smooth Sailing, because they "care". We actually do want the world to be a better place and feel that the issues around Ozone Friendly are important but that it 'will all end in tears': it is already too late. We like to communicate through channels we know, preferably face to face, on-on-one and in a familiar context.

#### *Brave New World Attributes*

Brave New World looks very different to the previous Roots although it is still strongly Settler. There is a skew towards the Prospector side (the left) and less affinity with the 'ethical' Pioneer area (e.g. no overlap on WYSIWYG).

The Brave New World Values Mode is much more coherently assertive. While still anchored firmly in Settler-land, Brave New Worlds are beginning to be concerned about appearances. Hence one reason why 'respect' is an issue for them, on which they can be quick to take offence. The areas of rejection are tightly clustered around what BNWs might call the 'hippy' values – experimentation with sexual roles, new forms of living or politics, being 'laid back', thinking globally, or accepting foreign influences.

Identity (as in group identity) is important for BNWs and they have a much more robust set of associated positive hot buttons than SS. Like GDs (below) they share 'Power' (as in power of others, not letting them have power over you) as an important Attribute.



Above: Attributes for Brave New World

**Certainty First – *tried and tested***

In many ways the Certainty First Mode is the best adjusted to the Settler World. As Certainty Firsts we want to trust in the "old ways". We use our experience in a very conscious way to adjust to changes in the world, which we'd really like to "just slow down". We don't necessarily reject the world although we see the past as more real than the future. We are likely to be attracted to projects and media concerned with celebrating and recovering the past, such as community history projects and continuing local traditions. We are part of the unchanging bedrock of society: dependably doing what we were doing a while back. We are an 'unbothered' though not uncaring Values Mode.

We also believe strongly that we are normal people. We want answers, not more questions. If anyone comes along to us with a new 'issue' which doesn't seem to have any immediate answers attached, it's not something we are attracted to. We will tend to push it away by reference to past events and truths. We are generally unexcitable: more "rational" than "emotional".

We may well be found doing voluntary work in local or traditional charities because we adopt roles, not personas. We disapprove of showing-off and approve of doing-our-job, and doing it well. We believe everyone has a part to play and it is a duty to perform, not an option.

Generally we are attracted to strong, simple explanations of reality. This can be ideologies and slogans, including religious tracts, and snatches of 'wisdom' encapsulated in sayings and rules to live by. That's how we think. In our view life can be much simpler than it is at the moment, and that may make us unlikely bedfellows with Pioneers out to simplify their lives, only we've never allowed us to get that complicated in the first place.

### **Mapping and Using Values Modes**

If you are interested in mapping Values Modes it can be done at the level of a population (the usual national sample CDSM recommends is 2,000), or any group. In a company or organisation it's possible to map every individual and even see the differences between individuals within a Values Mode. The values-segmenting questions can be added to more or less any other set of questions delivered in a normal marketing survey or poll. In the UK only 10 questions need to be asked, while in other countries it is 31.

The results can then be used in many applications for example:

- Creating a national or group picture or map of values
- Planning campaign or marketing strategies
- Showing values differences across responses to any polling question asked at the same time
- Revealing the extent of values as drivers in segmentations or surveys already carried out (by repeating all or part of the survey with values questions added)
- Revealing age, sex or other demographic skews against values
- In team building and performance (management/ HR applications)
- In showing values differences in opinion polling or for specific behaviours/ activities

To use Values Modes to create, test and improve offers or asks, as in marketing products, services or in campaign engagement, we suggest using qualitative research, with groups segmented by values differences.

The above descriptions are based on learnings from 30 years of values surveys, mostly conducted in the UK. The general picture of each Mode is probably very similar in many other countries although to tease out the fine detail would require development of equally dense models.

For more details on surveys, or 'immersion' training, contact Pat Dade at CDSM [pat@cultdyn.co.uk](mailto:pat@cultdyn.co.uk) (+44 7742 333372) or for campaign advice on using VMs, Chris Rose [chris@campaignstrategy.co.uk](mailto:chris@campaignstrategy.co.uk)