

ROOTING MARKETING STRATEGY IN HUMAN UNIVERSALS

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Global marketing strategies often follow one of two contrasting models, with each model making its own strong assumption about consumers. The localization model recommends customizing offers to fit unique local needs and wants. The globalization model, provocatively advocated by Levitt, recommends low price and product standardization, relying on product qualities that have been proved successful in the more modern economies.ⁱ A hybrid model sometimes called "glocal" generally tips in favor of the globalization model, allowing for only small, conveniently made changes in offerings.

Both models ignore crucial aspects of consumer behavior. In practice, both strategies, and especially localization, assume that consumers can readily and fully articulate their needs and preferences. It is then up to the firm to sense what they are and respond with an appropriate product or service offering. The fallacy here is that consumers often cannot read their own minds and often do not know what is technically feasible and therefore of potential relevance to them. This results in products being offered that are rooted in fairly superficial themes that ignore important drivers of behavior and the willingness of consumers to engage new experiences. Furthermore, both strategies underestimate the importance of consumers' establishing a deep, personal connection with a product or service. Most marketing strategies, and especially globalization, seem to assume that organizations can inject a particular message into consumer thinking. This too is a fallacy. In fact, the meaning of brands and product experiences more generally are co-created or co-constructed by firms and consumers, with the consumer's personal history and sense of self being particularly important.

Localization strategies can be costly to implement, and globalization strategies may fail to create or develop demand by stressing readily shared product features rather than shared needs. Thus the question here is, Is there, somewhere between the extremes of localization and globalization, an approach to global marketing that would respect and enhance the local consumer's sense of self while benefiting from the economic advantages of standardization?

The thesis of this article is that this can be achieved by rooting marketing strategy in human universals. Beyond their superficial benefits, consumption goods possess basic characteristics that connect them to emotional patterns and schemes of thoughts that are almost universally shared among human beings. Research in a variety of fields concerned with human behavior (among them, neuroscience, psychology, humanities, and economics) converge to show that individual differences emerge from basic and deeply experienced human processes that are shared by consumers in all cultural settings.ⁱⁱ We propose basing product concepts in these shared human traits and then facilitating the process by which consumers create a personal connection to the offered goods. In this way, managers acknowledge and take advantage of the robust and socially and culturally shared structures of thought and experience that underlie individual preference formation. These basic or fundamental structures are not only broadly shared among otherwise diverse consumer segments, but they are unlikely to change over time and are thus an especially sound foundation for developing marketing strategy.

There are three stages in the suggested strategic process:

1. Universal positioning, Formulate a concept and positioning for a product not as a response to the needs of a target segment, but rather in terms of basic emotions and feelings, or in terms of basic archetypes and metaphors, or in relation to a basic social function or ritual. The goal here is to identify something so fundamental that it will occupy a pivotal position in people's mind all over the world. The universal positioning

will generally reflect powerful, unconscious processes and outcomes that are also the *raison d'être* for the product or service category.

2. Local research. Understand how potentially different market segments, especially in local cultural settings, uniquely experience the chosen universal positioning. This requires identifying the ideas, activities, and images that are locally associated with the universal elements serving as the product's core concept.
3. Stimulating co-creation. Surround the universal position with just enough local associations and meanings to enable consumers to confirm their self-identify and at the same time challenge them to expand in new directions that are personally relevant. This results in personally meaningful brand stories being created by consumers that are directionally consistent with the strategic goal of the firm.

These three stages differ significantly from the usual marketing strategy process in a number of ways. They go beyond rooting products in standardized features and instead emphasize universally shared drivers of consumer behavior. They also acknowledge the need for consumers to engage in a process of personalization and create their own stories around the offered products. Moreover, they stress the importance of going beyond sensing and responding strategies and moving managers into a mode of thinking that involves anticipating consumer needs and leading consumers in directions that result in the creation of new demand. Traditional strategies of globalization and localization are most focused on harvesting demand, whereas the approach we describe permits cultivating demand as well.

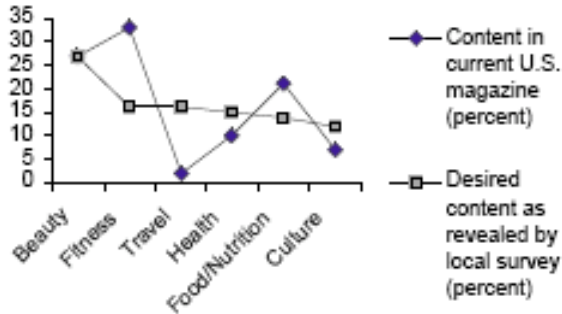
The purpose of local research in this framework is not to confront local consumers with a global good and explore their reaction. Research is not about recording preferences for certain attributes or about eliciting willingness to pay for a standard offer. Research is about finding out how the local market relates to deeper ideas in relation to which a product is going to be positioned.

Co-creation does not preclude a lot of standardization. As products are positioned in terms of deep universal emotions or myths (for instance), one can obtain the paradoxical result that a greater sense of personalization is reached through greater product standardization, not through greater physical customization.

AN EXAMPLE

Consider the case of *Fit Magazine*, a highly successful U.S.-based magazine promoting a healthy lifestyle for active women.ⁱⁱⁱ *Fit* is planning to launch a version of the magazine in China. A survey of Chinese women in the target market has been conducted, asking them what content mix they would like to see in the magazine. Figure 1 contrasts their answer against the original U.S. magazine content.

FIGURE 1



These data can be used to highlight the conventional contrast between globalization and localization strategies. By supplying the China market with the (translated and mildly adapted) U.S. version, Fit would basically confront a mismatch of tastes. It might appeal to a certain fringe of highly Westernized consumers and hope for a trickle-down effect, but this process is unwarranted and may take a long time. By supplying consumers with what they say they want (basically, a magazine focused on beauty), success might be more immediate, but the logic that has made Fit so successful in the United States (an emphasis on fitness, health, and nutrition, with a secondary reference to beauty) will be lost, and the adaptation will be costly, jeopardizing Fit's standing as a strong competitor in that market.

What could rooting marketing strategy in human universals mean in the context of this case?

- Universal positioning.* At the root of the magazine's success in the United States are human universals that are truly causing the U.S. customer's deep attachment to the magazine. These universals include emotions, such as the fear of being sick, the joy of feeling in control, and a fascination with beauty. The success of Fit is also grounded on archetypal ways of thinking, such as a quest for balance between body and mind, balance between work and leisure, and a differentiation between male and female physical activities. These emotions and metaphors no doubt can take many different shapes in different contexts, but they will always be there. Fit talks to women who find balance through physical activity. This is a positioning that should be universal.
- Local research.* When exploring the connection women make between balance and physical activity, it appears that there are significant differences between China and the United States. Research on this topic through prolonged interviews and secondary sources reveals that Chinese women would view this connection as a matter of experiencing balance (for example, through pleasurable activities including badminton, tennis, and swimming that tend to take place outside and include breathing fresh air and having fun with others), while U.S. women tend to view this connection more as a matter of regaining balance (for example, through effortful individual workout routines and improved nutrition).^{iv} A typical sought-after outcome of physical activity is a more muscular body for U.S. women and better-looking, healthier skin for Chinese women. Although food is important in both nations in connection with a balanced and healthy life, Chinese women are not inclined to view changes in traditional food habits as contributing to the linkage between balance and physical activity.

- *Stimulating co-creation.* It transpires from the survey results -"that Chinese consumers do not readily desire a product as contrasted and focused as Fit Magazine. However, balance between body and mind and the connection between balance and physical activity can be used as universal roots on which to develop a highly valued press product, Local research indicates that the U ,S. emphasis on nutrition should be reduced and replaced by some emphasis on beauty, which reinforces both fitness and health constructs in the Chinese frame of mind, Besides this basic adaptation, there are other minor ingredients that need adaptation, but research reveals that a mix of local and Western elements is viewed as more exciting than the sole use of local symbols and ideas.

FOUNDATIONS: HUMAN UNIVERSALS AND THE SELF

The claim that global strategies should start by choosing a universal positioning is inspired and justified by converging research identifying a number of profound and seemingly universal traits in the human way of approaching the world, Cataloguing human universals is beyond the scope of this chapter, but it is useful to understand the broad categories in which they fall,

EMOTIONS AND FEELINGS

Recent research in psychology, motivated by findings in neuroscience, has emphasized that emotions play a central role in human thinking, often underappreciated because it is mostly unconscious. Emotions are now viewed as biologically determined, complex, and stereotyped patterns of chemical and neural responses to stimuli. These patterns form the inherited core of our avoidance-approach behavior. Feelings are more inwardly directed images engendered on the basis of emotional responses. Reason, in this framework best outlined by Damasio,^v appears as an effort to devise plans of response and to manage a consistent self beyond the here and now, but it is unclear that reason can (or is even meant to) supersede emotions.^{vi}

Damasio speaks about six universal emotions; happiness, sadness, fear, anger, surprise, and disgust. These emotions are like primary colors, and most products can be seen as resting on a cocktail of emotions, For instance, a sequence of fear and happiness is at the core of most memorable entertainment products; a crispy chocolate bar offers a combination of happiness and surprise, Then there are secondary or social emotions; embarrassment, jealousy, guilt, or pride, which are emotions based on the observation and perception of our own behavior.

The old idea that the conscious assessment of a product's benefits precedes or supersedes affective evaluation is misleading. The conventional marketing approach of treating awareness separately from liking is also highly questionable. Sometimes we view emotional appeals as surface ingredients that managers can decide to use or not use. This is also misleading, as emotions are our basic way of perceiving the world. The most successful marketers know that every detail of the marketing mix, even price, has the potential to produce a persistent emotional response.

A strong connection to basic emotions is at the root of the subjective value created by large industries (ranging from games, to insurance, to entertainment). The resulting products touch everyone and lend themselves well to relationships. They usually carry a high potential of internalization, as they tend to be central to the set of things consumers will call theirs and treat as building blocks of their identity.

ARCHETYPES AND DEEP METAPHORS

When consumers attempt to make sense of their feelings and seek to determine what to do, they use mental models that allow them to give meaning to their environment and to conceive a role for themselves. The mind supplements missing information with elements that are consistent with mental models and schemes. For instance, if someone has been hurt, someone must be guilty of some wrongdoing.

All societies share many archetypical roles such as the hero, the villain, and the wizard. Such archetypes appear in stories such as Little Red Riding Hood that have universal appeal and constitute a basic meaning even though the images and other details expressing universal archetypes may differ.

Archetypes have been classified in a number of ways.^{vii} Mark and Pearson highlight the fact that the use of archetypes in marketing, offering shared structures that consumers and firms dynamically animate with relevant stories, can help marketers transcend the somewhat unfortunate stereotyping that often results from conventional positioning strategies.^{viii} According to these authors, managers should actively discover which archetype their brand is living out. This process transcends conventional positioning: instead of putting brands in a well-defined and well-controlled box targeted at certain people, universal positioning relying on archetypes can direct marketing campaigns that are naturally inclusive and transnational.

While archetypes mostly refer to roles or situations that can be built into stories, deep metaphors refer to robust and widespread ways of expressing one thought in terms of another. The Zaltman metaphor elicitation technique is a research process that seeks to isolate deep metaphors as they apply to specific topics or products, Balance between body and mind is a metaphor that will prove useful in both the United States and in China to express the idea of fitness. Games, wars, human qualities, growing plants, fluid mechanics, and body movements are some of the most widespread sources of metaphors that people use to express their thoughts vividly, The purpose of metaphors is to convey meaning in a way that people are almost certainly relating to. The spontaneous process of using metaphors consists in stepping back and using a shared experience to describe something. Thus, metaphors are core elements of effective universal positioning,

SHARED CULTURAL TRAITS

While emotions relate to embodied patterns of response and archetypes (and metaphors) relate to shared ways of thinking, there is a third source of human universals, It has been argued recently, mostly by Brown, that a number (larger than usually assumed) of cultural traits and social activities and arrangements are largely shared among humans.^{ix} Research on cultural systems has spent much of its energy focusing on particular differences across cultures, but Brown insists that many codes, norms, and social practices (such as those related to cults or parenting) are universally shared, For example, social elements related to stages of life (as simple as who is teaching children to walk and talk and read) tend to be central to all human experience and are a fertile source of inspiration for universal positioning.

BUILDING THE SELF

The idea that global products imposed from outside should be replaced by universally positioned products opening up to local co-creation is based on a long tradition that consistently emphasizes the construction of self in response to events and experiences that find their primary source in our body or in basic social structure. Freud understood that people spend energy trying to define their self over time, reconciling states of mind and the pressures of the environment, in a generally consistent and productive fashion. Psychologists heavily inspired by the findings of neuroscience, such as Damasio, LeDoux, and Wilson, call consciousness the locus of an autobiographical self, a kind of second-order process that helps us guide our actions.^x Memory plays an essential role in this self-building activity.^{xi}

The existence of a desire to co-create^{xii} is central to another body of work that consistently suggests that a certain amount of exercised control, challenge, and stimulation, besides causing pleasure and acknowledging personal skills,^{xiii} is critical for sustainable product adoption, as these elements will lead to the product's being registered as an authentic extension of the self.

CONCLUSION

Marketers should start any effort by digging below superficial attributes and benefits in search of an important and universally human terrain where consumers can grow in their own terms but in a direction strategically set by the firm.

This approach implies a new viewpoint on the potential of standardization. Beyond returns to scale, standardization (grounded in human universals and challenging consumers to a process of internalization) can harvest returns to mental depth in the form of broad demand. The process we advocate allows someone to call a product his while not feeling impoverished or threatened when someone else is calling the same product hers.

This approach also clarifies the role of market research by insisting that its primary goal should be to explore personal connections with the universal positioning themes. This logic may resonate more naturally with managers in certain industries (such as entertainment or toys). However, we believe that this logic should be central to any sustainable marketing effort.

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ⁱⁱⁱ This stylized example is based on data from a field study supervised by the first author and realized by Harvard Business School students Nikita Agrawal, Ada Lien, and Daniela Nedialkova.

^{iv} See, for example, M. H. Bond, *Beyond the Chinese Face* (New York: Oxford University Press, 1994).

^v Damasio, *The Feeling of What Happens*.

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^x Damasio, *The Feeling of What Happens*; J. LeDoux, *Synaptic Self* (New York: Viking, 2002); Wilson, *Strangers to Ourselves*.

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^{xii} We do not mean to say that each consumption act should require high involvement. What we mean is that successful products will produce a confirmation or an enhancement of the self.

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