

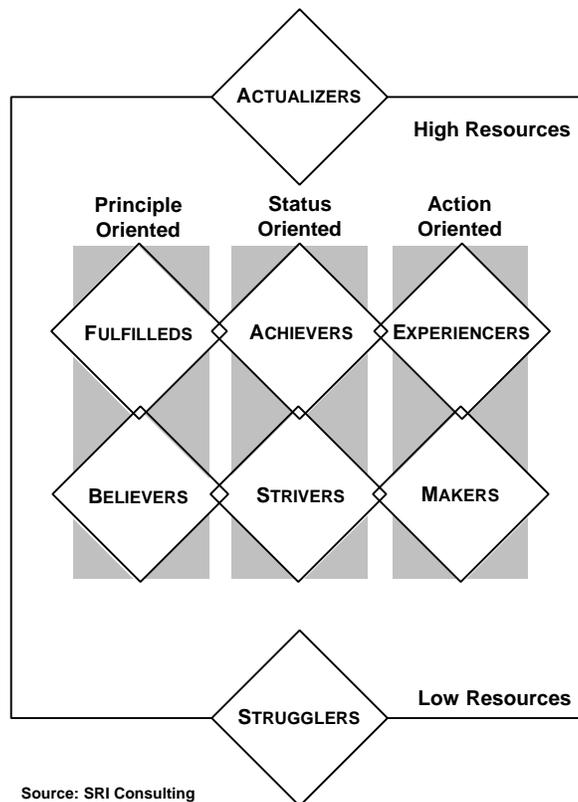
# VALSä

## An Abbreviated Guide

The VALS system makes explicit the link between psychological attributes and con-

sumer choices using two dimensions: **self-orientation** and **resources**.

### The VALS 2 Network



## The SELF-ORIENTATION Dimension of VALS

As consumers, people buy products and services and seek experiences that fulfill their characteristic preferences – that help give shape, substance, and satisfaction to their lives.

VALS calls the patterns of attitudes and activities that help people reinforce, sustain, or even modify their social identity “self-orientation.”

The orientation determines what in particular about the self or the world is the meaningful core, the vital center that governs people’s activities in life.

The VALS system segments consumers according to three self-orientations: principle, status, and action.

**Principle orientation:** The principle orientation is grounded in the realm of ideas, knowledge, and ideals.

For some people, this orientation is manifest in intellectual curiosity, aesthetic interests, or a quiet philosophical searching.

For others it is manifest in adherence to a personal or a socially received code of conduct, whether religious conviction, moral or ethical system, or social norm.

In either case, the tendency is to base decisions on abstract, idealized criteria such as quality, integrity, and tradition rather than on feelings, experience, or a desire for social approval.

Actions are meaningful to principle-oriented people to the extent that they are shaped by, reflect, or move toward greater understanding or belief.

**Status orientation:** In the status orientation, people strive for a clear social position.

Status-oriented people seek explicit responsibilities and rewards conferred by a valued social group.

Their focus is often on collective activities, such as work and family life, and on positive evaluation and achievement, which imply shared ideas of excellence or ethics and a reciprocal willingness to accommodate oneself to the judgments of others.

Status-oriented consumers base their choices on the expected reactions, concerns, desires, and abilities of people in the groups to which they belong or aspire to belong.

These consumers make choices that they hope will enhance their position or facilitate their recognition and acceptance by their own group or another more desirable group.

**Action orientation:** The action orientation is grounded in direct experience.

Actions are valued for their impact on the physical world, for the pleasure or excitement associated with them, or for their effect on others.

An emotional, vital attachment to experience and action and a resistance to social controls that threaten to rule out the experimentation and self-reliance that are central to the action-oriented person’s self-image.

The life organization implied by this orientation tends to be a jumble of enthusiastically embraced projects and activities.

Action-oriented consumers take events at face value as separate experiments about the self or the world, rather than regarding them as part of a larger plan or purpose.

They make choices that promise adventure, exploration, risk, and discovery.

## The RESOURCES Dimension of VALS

Consumer resources are traditionally characterized by age, education, and income.

VALS expands on the concept by adding several key psychological attributes, including energy level, self-confidence, awareness of products and media, and level of consumerism (propensity to purchase.)

Different levels of resources enhance or constrain a person's ability and motivation to act according to his or her self-orientation. The resources dimension gives the VALS typology its hierarchical design.

The four VALS consumer groups at the top of the VALS 2 Network have more abundant resources than the bottom four groups have.

Strugglers are at the lowest resource level and tend to be older, poor, undereducated, unemployed, and in poor health.

Actualizers, on the other hand, are at the upper end of the resources continuum. They tend to be wealthy, well educated, self-confident, sophisticated, and energetic, with a zestful appetite for life.

In the middle range of resources, consumers show one orientation more than another; persons at the extremes of the resources dimension, however, do not fall squarely within any of the self-orientation categories.

Against these two dimensions – **self-orientation** and **resources** – the VALS segments of consumers emerged, each exhibiting distinct attitudes and behavior.

## VALS Types Not Associated with Public Radio Programming

Six out of the eight VALS categories are of little interest to public radio. Each represents 6% or less of the audience.

Their small numbers in our audience should come as no surprise. Higher education is the prime predictor of listening to public radio, a qualification largely missing from these brief resumes:

**BELIEVERS** (16% of the U.S. population) are church-going moral conservatives bound by traditional notions of family, community and country. Most are older than 55; few are educated beyond high school. Many are retired or homemakers. Incomes are moderate.

**ACHIEVERS** (14%) are mostly materialistic, ambitious, white-collar workers. Half earn more than \$50,000 a year. Two-thirds are *not* college graduates.

Politically conservative and socially conventional, they tend to be married women in their 30s and 40s who buy products and services to impress their peers.

**STRIVERS** (12%) are largely high school graduates in blue-collar jobs with moderate to low incomes. Half are married; most have children.

Money dominates their lives – they never have enough of it – and prestige equals having consumer goods they mostly can't afford. They're often frustrated, insecure

individuals who feel like life has given them a raw deal.

**EXPERIENCERS** (13%) are largely young, single, fickle thrill-seekers. Mostly under age 35, they are equally divided among high school graduates, those attending college, and college graduates.

They make little money but have few responsibilities, so they can afford to load up on trendy consumer goods and entertain themselves.

Other than disdain for authority and awe for wealth, they really aren't sure what they believe. These are lives in formation.

**MAKERS** (12%) are mainly self-sufficient, rural-dwelling, political conservatives who experience life as a do-it-yourself project.

Physical work and recreation define their world. Larger society is of little interest as long as it doesn't tread on their individual rights.

Most are high school graduates in their 30s and 40s with moderate incomes. More than half are married; they are likely to have large families.

**STRUGGLERS** (10%) tend to be 55+ women with low incomes, little education and poor health who are overwhelmed with life's difficulties. Almost half are widowed or divorced; many live without a social or familial support network.

## VALS Types Highly Associated with Public Radio Programming

Public radio listening is dominated by three VALS types:

**ACTUALIZER-FULFILLEDS:** a micro-segment that represents 3.7% of the U.S. population but 24% of public radio's weekly cume.

**ACTUALIZER-OTHERS:** a micro-segment with Actualizer as the primary identification and a

variety of secondary types that are *not* Fulfilleds (11% of the cume).

**FULFILLEDS,** a VALS macro-segment that comprises 10% of all Americans and 30% of public radio's weekly audience.

VALS micro-segments combine the characteristics and behavior of two VALS types, dominated by the primary designation.

## Actualizers and Fulfilleds In Brief

### ACTUALIZERS

Actualizers are successful, sophisticated, active, take-charge people with high self-esteem and abundant resources.

They are interested in growth and seek to develop, explore, and express themselves in a variety of ways – sometimes guided by principle and sometimes by a desire to have an effect – to make a change.

Image is important to Actualizers, not as evidence of status or power, but as an expression of taste, independence, and character.

Actualizers are among the established and emerging leaders in business and government, yet they continue to seek challenges.

They have a wide range of interests, are concerned with social issues, and are open to change. Their lives are characterized by richness and diversity.

Characterized by abundant resources (time, health, energy, money, education, self-confidence) and a blend of the most positive aspects of principle, status, and action orientations, these sophisticated consumers constitute about 12% of the adult population.

As consumers, Actualizers are adventurous and quality conscious and they exhibit a cultivated taste for the finer things in life.

Half the individuals in this segment are between the mid-30s and 60s. They are highly educated and earn the highest incomes of any of the segments.

Most are married, and about 60% have no children under the age of 18.

Along with Achievers, they are most likely to be employed outside the house and are highly concentrated in professional, technical, and managerial occupations.

### FULFILLEDS

Fulfilleds are mature, satisfied, reflective people. They are principle oriented and value order, knowledge, and responsibility.

Most are well educated and in – or recently retired from – professional occupations. They are content with their careers, families, and station in life; are well informed about the world and national events; and are alert to opportunities to broaden their knowledge.

Their leisure activities tend to center on their homes. Fulfilleds have a moderate respect for the status quo, institutions, and social change.

They tend to base their decisions on strongly held principles and consequently appear calm and self-assured.

Although their incomes allow them many choices, Fulfilleds are conservative, practical consumers; they are concerned about functionality, value, and durability in the products they buy.

Fulfilleds constitute some 10% of the U.S. adult population. They typically are middle-aged or older (median age is 55), with college education and higher-than-average incomes.

More than one-third of Fulfilleds are employed in white-collar positions.

Most are married, and close to half have dependent children.

## Self Concepts

### ACTUALIZERS

Actualizers hold a variety of self-concepts that reflect their strong sense of self and their ability to draw upon many self-orientations.

They see themselves variously as amicable, brave, broad-minded, creative, dominating, efficient, egocentric (only a few Actualizers express this self-concept), frank, funny, intelligent, refined, self-assured, and sociable.

Of all VALS groups, Actualizers have the most positive self-images. Their access to the highest level of resources breeds confidence and an optimistic outlook.

They are the most assertive and self-confident group – goal-oriented, responsible, organized, enthusiastic, and in charge of themselves and the situation they face.

When analyzing an issue, Actualizers can see the whole picture; they know where they are heading.

In addition, because they actively interact with all that life gives them, Actualizers are the least passive of the VALS segments.

In their pursuit of satisfying lives, Actualizers are quite complex. When appropriate, they can be demanding, critical, and even bossy; indeed, they are a most demanding group – requiring much of themselves as well as others – second only to the Experiencers.

Nevertheless, they are more cooperative, more affectionate, and kinder than the average American is.

In addition, Actualizers are cheerful and considerate, though slightly less so than Experiencers and Believers.

### FULFILLEDS

Fulfilleds are likely to think of themselves as amicable, creative, efficient, frank, intelligent, refined, reserved, and self-assured.

They are active participants in life. As befits successful, comfortable older adults, Fulfilleds are mellower, more relaxed, less temperamental, and less demanding than other groups.

However, they are less easygoing, fun to be with, considerate, and cheerful than the average American is.

As a reflection of their maturity, they have a more sober, more balanced way of looking at life than younger groups do, showing less inclination to grab the bull of change by the horns.

The Fulfilleds' sense of self is not as intense as Actualizers. Fulfilleds are quieter than Actualizers. Though equally sure of themselves, Fulfilleds are less aggressive and moderately less assertive and confident.

## Consumer Concepts

### ACTUALIZERS

As consumers, Actualizers see themselves in a variety of ways.

They are often cautious purchasers, wanting to know exactly what they are buying. But, once hooked, Actualizers can show strong brand loyalty. They know products inside and out.

However, Actualizers can be fickle: Change an oft-purchased product, and they notice immediately, perhaps jumping to a competing product.

Actualizers often purchase items to reflect their personal styles; they often see home furnishings, for example, as extensions of their personalities.

They plan their purchases around their lives, to supplement and expand their definitions of themselves. For example, because of their strong interest in social issues,

Actualizers often purchase products and services that reflect their concern for the environment.

### FULFILLEDS

As consumers, Fulfilleds have specific characteristics. They see themselves as planners and organizers; they try to anticipate their future needs so as to be best prepared. Fulfilleds plan their purchases carefully and are particularly cautious about buying bigger-ticket items. They want to know as much about the products they buy as possible. Does a product meet their needs and offer practicality and durability?

They are not impulsive buyers and are especially hesitant to purchase new products. Rather, they check out innovations thoroughly before committing themselves.

Because they are so knowledgeable about products and new developments, Fulfilleds do not remain loyal to products and brands. They stay with a product as long as it fits their needs – until the next best item comes along or until they find a competitive one that benefits the environment or society.

For example, given a choice, Fulfilleds would purchase recycled-paper products over those that do not use recycled materials.

## Social Settings: Home & Family

### ACTUALIZERS

More than 80% of Actualizers own homes. With a higher-than-average number of resources and multicultural interests, Actualizers are likely to furnish their homes well, with wide variation in style.

They enjoy books and magazines, works of art, mementos of travel, and similar accessories.

Open to trying new products, Actualizers are likely to have the greatest number of the latest electronic gadgets and equipment (large-screen TV sets, home computers, video games, and so on).

Preserving the nuclear-family structure is not as important to Actualizers as their children's well-being.

Actualizers, like Makers and Achievers, view children as positive images. However, Actualizers expect their children to be independent – an expectation in line with their often-fractured family structure – whereas the more family oriented Achievers and Makers favor images of family togetherness.

### FULFILLEDS

Some 80% of Fulfilleds own homes and their residences are typically eclectically furnished and well organized.

Their homes tend to be more conservative and less flashy or trendy in look than some other groups' homes are. Furnishings may range from heirlooms to Oriental rugs and may be contemporary or traditional; many homes show the influence for their owners' extensive travels.

In all, though, their belongings – especially durable furniture and reliable appliances – are practical and typically good quality with a high level of functionality.

Roughly half of Fulfilleds have families; however, because they are typically somewhat older than the average American is, they are increasingly likely to have adult children living away from home.

Fulfilleds like to spend time with their families, especially as the children grow older. Many of them want to give their children experiences they themselves had with their parents. As a result, they often spend vacations with their children.

Despite this strong family interest, Fulfilleds are fiercely independent people. Family time is important; individual time is equally precious, if not more so.

## Work

### ACTUALIZERS

Actualizers see their jobs as careers; work is a major source of satisfaction and meaning for them.

They like to be in control or to guide. Combining the need for control with an entrepreneurial slant, many Actualizers own their own businesses or work out of their home. As a result, they are very likely to have offices within their homes, owning more equipment and devoting more space to such rooms than to other groups.

Images that link Actualizers with white-collar jobs and work settings make considerable sense. This group relates well to images of competent managers and professionals.

In addition, Actualizers appreciate broad, intellectual kinds of work and are comfortable with relatively independent, self-defined tasks.

Their high level of sophistication requires an in-kind response; anything less is insulting.

### FULFILLEDS

Fulfilleds are highly career oriented; they are likely to have worked many years for one employer.

To them, work is not work but an enjoyable experience; it gives meaning to their lives.

Many Fulfilleds use their positions to pass on their knowledge and experience to junior staff.

Though many of them work for private companies, they are more inclined to take positions with private schools and government jobs because they can have the greatest influence in these jobs.

In addition, many Fulfilleds put their knowledge to work in their own businesses.

Fulfilleds most appreciate images of white-collar positions that require intelligence, especially those that feature competent managers and professionals.

This segment is a thinking group that works independently of others, creating its own definition of self.

## Organizational Membership

### ACTUALIZERS

Actualizers are cognizant of social issues, an understanding they put into action through participation in leading social organizations.

They participate widely in business and civic clubs as well as school and church boards. Cultural interest groups and social-awareness programs are also likely to attract Actualizers.

Highly committed to the activities in which they participate, Actualizers gravitate toward groups that convey positive messages to them – for example, those that reflect social awareness, commitment, and leadership and that seek to make a difference in the world.

### FULFILLEDS

Fulfilleds like to participate in a variety of organizations. Because many of them are quickly approaching retirement, this involvement makes a great deal of sense, not only from a purely social perspective but also from an intellectual one.

The American Association of Retired Persons (AARP), for example, serves both needs: It provides information relevant to people of or approaching retirement age (for example, on tax issues and health care) and also offers frequent social events and trips.

Other groups, such as civic clubs and art associations, offer similar opportunities. These groups are appealing for different reasons. Civic clubs address Fulfilleds' concern about their communities and states, whereas art groups directly meet their needs for cultural awareness.

Other societal issues attract Fulfilleds as well. Attractive images, then, include ones that focus on social issues (such as environmental concerns and homelessness), cultures and cultural activities, and active older people.

## Political Orientation & Image

### ACTUALIZERS

Actualizers take politics more seriously than other groups do.

This group often participates in political and related activities, and regards such involvement as important to its self-orientation.

Because of Actualizers' strong self-images, they are likely to believe they have more to offer society than other people do. Their high interest in political issues reflects this belief.

Actualizers are 50% more likely than all adult Americans are to have voted in an election during the past 12 months and are most likely to have met with political officials or to have worked for political parties.

They are likely to have worked in political campaigns, written to or spoken with political officials, taken leadership in civic organizations, given speeches or published articles, and participated in similar activities.

Because Actualizers comprise roughly half of a group describing itself as "very liberal" (5% of the entire population), communication using political imagery is likely to catch their attention, especially if the imagery has links to a major social cause.

For example, an advertisement might connect a product or service with images showing the destruction of the rain forest or pollution in its many forms.

### FULFILLEDS

Like Actualizers, Fulfilleds are serious about politics and related issues. They do not like to be ignorant about current events, so they try to remain on top of everything.

Fulfilleds are not content simply to understand such matters, however; they believe they have a responsibility to become involved and take charge of situations. No one needs to tell them what to do.

Such involvement is important to their overall self-orientation. Their beliefs drive their activities, whether they meet with or work for political officials and groups, or simply vote regularly.

Activism is their right, and they feel free to exercise it.

Patriotism aside, Fulfilleds believe that involvement is a moral imperative. They believe they must back up criticism with action.

To them, participating in the system is the best way to change it. Voting, for example, is one positive way to do so.

Because of their huge interest in political daring-do, images suggesting commitment or patriotism are likely to attract Fulfilleds.

Helping them visualize the effects of serious social problems (such as the effect of drug use or deforestation) can also win their attention.

## Sources of Satisfaction

### ACTUALIZERS

For Actualizers, home represents a great source of satisfaction because it is an extension of their characters or personalities.

Specific neighborhoods further define the meaning of home to Actualizers. Personal possessions, in contrast, are less satisfying overall.

Though Actualizers acquire many possessions, they do not consider them as important to their overall happiness as do other groups. In general, Actualizers do not need a lot of material goods to be fairly satisfied with themselves.

Actualizers' commitment to whatever they are doing makes nearly all their activities sources of positive images.

Because careers are an important part of their lives, Actualizers gain considerable satisfaction from their work experiences and jobs.

Non-work activities are also an excellent source of satisfaction for this group, which openly embraces new experiences and activities. Such activities might include volunteering with community-action groups or playing individual sports.

Being in control of a situation or a group is also enormously satisfying to Actualizers because they believe their involvement can make a difference.

They like to put their whole being into causes. Their return is knowing they have contributed to causes with tangible benefits.

### FULFILLEDS

Fulfilleds are most satisfied when they are fully informed about or aware of the world around them, from a global perspective down to a local viewpoint.

They see no excuse for ignorance; the world is readily accessible. For example, foreign and local newspapers are available in many places, giving us an easy way to understand situations in other lands.

Full awareness translates directly into action, providing another source of satisfaction.

Fulfilleds enjoy watching their knowledge and understanding affect the world. Behind this pleasure, though, is the belief that they are doing what is right, what is best, and what is correct, not only for themselves but also for everyone around them.

Because family is an important part of Fulfilleds' lives, they gain an immense amount of satisfaction from watching their children and their children's children grow up. Family makes them feel complete.

Fulfilleds enjoy the escapist qualities of music and reading.

Music, particularly classical music, often relaxes them; it is a stimulating art form that requires concentration for full appreciation.

Books provide an altogether different experience. By reading, Fulfilleds not only gain the important information they desire but also become aware of the world around them.

Moreover, Fulfilleds often can translate these interests into action – for example, by traveling the world to experience a place or activity they've read about.

## Sources of Stress

### ACTUALIZERS

Given that Actualizers constitute the most affluent, best-educated, and most psychologically mature group, they worry less about local, more tangible social threats, such as unemployment or housing costs, than any other group does.

Rather, their greatest concerns are those that affect the human race nationally or globally, such as the national budget and environmental issues.

Because Actualizers have a greater understanding of the public issues than other groups do, messages targeted to them may delve into greater detail.

Given that they like to be in control, they resist any form of restraint, whether in the form of job management or mundane routines. They like to be in charge and on the move, always analyzing the big picture from a different perspective.

This group expects the most of itself, as well as of others. When groups with which Actualizers work move too slowly or focus too narrowly, Actualizers become frustrated and experience stress, quickly losing patience.

Actualizers enjoy being at the forefront of life; however, being lifestyle leaders is often stressful. They wonder how they will be able to maintain their lifestyles into retirement age. Will they be able to simplify their lifestyles when and if they desire?

Actualizers cannot necessarily turn to their parents for guidance in these matters. Although the two generations' situations are similar, the circumstances are not. Approaches that worked in the past do not necessarily hold up today.

As leaders, Actualizers are often the first people to be aware of global and environmental concerns. This situation can be particularly stressful; they are leading the mass market into uncharted territory, yet they themselves are strangers in a strange land.

They do not necessarily know the solutions and have difficulty communicating the severity of problems to the masses. However, they believe that their high levels of self-confidence will carry them through any difficulties.

They understand issues and can differentiate between problems and explore how to deal with each one. Being planners, they can analyze situations, quickly determining the actions necessary to maintain an even keel.

### FULFILLEDS

Because they seek to make the best choices possible, Fulfilleds often experience stress when they must make decisions.

Their only requirement is adequate information on which to base their decisions; however, unbalanced or biased data frequently stymie them. Facts must show the pros and cons of the situation, so Fulfilleds continuously search to the last detail.

Even when they have collected everything available, Fulfilleds may still question whether they have enough details.

We often look to Fulfilleds for answers; for this reason, they may undergo stress if they lack an adequate answer or solution. Similarly, they can become upset with people who do not consider the information important or cannot process it rationally.

In this way, social issues become avenues for stress – not so much because of the problems themselves but because of the difficulty of developing adequate solutions to them.

For example, the issue of recycling materials is not new. Fulfilleds are likely to know all about the reasons for recycling and how it can help preserve or resources. However, they are also likely to know how much of each material is actually recyclable and whether recycling is economically feasible.

Fulfilleds can become frustrated if they know a solution exists but the solution is not practical or they cannot convince other people of the problem's magnitude.

Group interactions may also be stressful. Because they are information intensive, Fulfilleds may have difficulty relating to other people. This inability to connect may be because people do not always take their knowledge seriously or absorb the information they provide.

Thus, Fulfilleds are more comfortable with straightforward, one-to-one interactions than with group efforts.

## Recreation & Leisure

### ACTUALIZERS

Actualizers enjoy and participate in a wide range of leisure and recreational activities, a reflection of their high personal, physical, and psychological resources.

Such activities often stem from intellectual, creative, or cultural interests; hence, strong interests in museums, adult education, or photography are typical. They dabble in gardening, cooking, or reading.

Actualizers are generally willing to try a bit of everything.

Actualizers are more likely than other groups to attend theatrical events, reflecting their strong slant toward culture and the arts. Though they enjoy a wide variety of live performances, they lean strongly toward classical concerts, theater, and dance.

### FULFILLEDS

In addition to vacationing with their children, Fulfilleds enjoy and participate in a wide range of activities.

Not only have their vast knowledge and reading exposed them to many ideas, Fulfilleds also have the time to study and cultivate new skills.

For example, adult education courses provide significant pleasure. Subjects that relate to the arts or culture, such as musical instruments or photography, also grab their attention.

Not surprisingly, art and culture directly influence Fulfilleds' entertainment choices. They enjoy attending theater shows and classical concerts, also taking in movies or dance performances occasionally.

## Sports & Exercise

### ACTUALIZERS

Though not as active in team sports as other groups are, Actualizers are likely to participate in individual sports.

Individual sports offer the opportunity to push themselves to the limit without relying on or considering others; these sports represent a personal challenge that team sports do not necessarily offer.

In addition, Actualizers' often busy schedules may make team participation impractical. For this group, then, the most attractive sporting images are those that emphasize individual performance.

Actualizers like nearly all sports, though they seem to prefer outdoor sports such as skiing and hiking.

Though they are open to trying various sports, Actualizers have little interest in several of them, particularly bowling, roller-skating, freshwater fishing, hunting, and archery.

Though Actualizers are heavily participatory, they also enjoy many spectator sports, especially team efforts, for which they themselves have little time or energy.

These sports include college and professional baseball, basketball, and football. Tennis, a sport in which Actualizers actively participate, is also a strong draw for the Actualizer audience.

Surprisingly, Actualizers are very particular about the events they watch. They do not watch rodeos or drag or stock-car racing. Rodeos, for example, represent a rural, outdoor experience that differs from that which Actualizers enjoy most; quiet solitude, alone with nature.

### FULFILLEDS

Fulfilleds have no interest in team sports, preferring to participate in individual sports.

This preference is consistent with their approach to social interaction: Team sports emphasize group effort and participation, and individual sports are much more interesting to Fulfilleds.

Fulfilleds would rather learn and practice an individual sport to their satisfaction than concentrate on assisting teammates.

Despite potential age restrictions, Fulfilleds pursue active lives, so their sports interests run a wide range. Nearly all their preferences are outdoor sports, including sailing, cross-country skiing, and hiking.

They eschew only a few sports, such as water skiing, hunting, or horseback riding.

Spectator sports of interest include basketball and college football.

Because they generally have close ties to universities through employment, their children, or their own education, Fulfilleds have a great affinity for following the major sports activities of their or their children's alma maters.