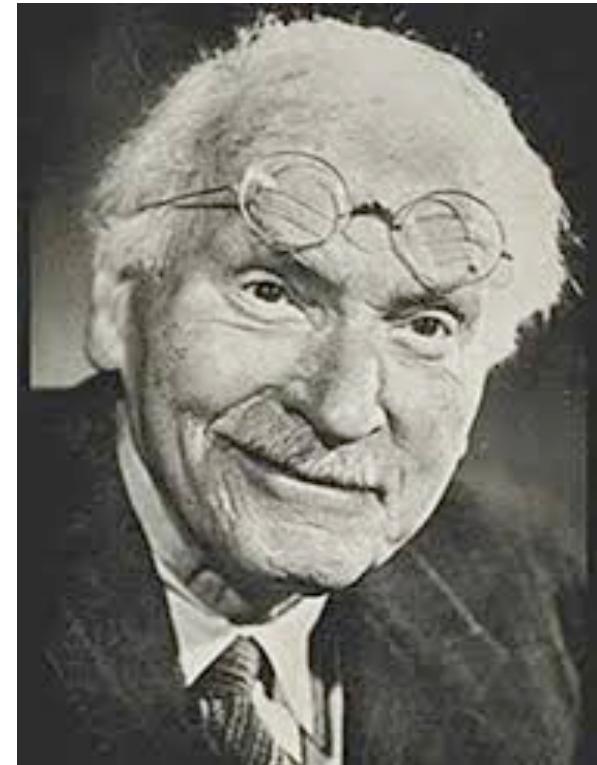


Jungian Archetypes:

Exploring Jungian Archetypes in User Segmentation

- CARL JUNG - Swiss psychiatrist and psychotherapist who founded analytical psychology
- Idea of archetypes was based on Kant's categories, Plato's Ideas, and Schopenhauer's prototypes
- Using IBM Watson Personality Insights how might we map the 52 Signals (Big 5, Needs and Values) to a Jungian Archetype model.
- If validated. might this linkage be used to develop user segmentation methods of value?

**DRAFT
DISCUSSION
PAPER
(work in progress)**



Caveats

This is an **informal discussion paper** to begin a conversation about how data derived from IBM Watson Personality Insights – namely Big 5, Needs and Values, could potentially map to the Jungian Archetype.

This is NOT a scientific paper nor academic paper – but rather it is the start of a conversation and exploration.

The assertions and hypotheses not should be handled with care – as they have not been peer reviewed by someone with domain expertise in psychology, psychiatry or personality theory. Ideas presented are intended to stimulate dialog

The information contained in this paper and related blogs are my own opinion and do not necessarily represent the views of my employer. Trademark images are used under ‘fair use’ provisions covering commentary and research.

- Ryan Anderson

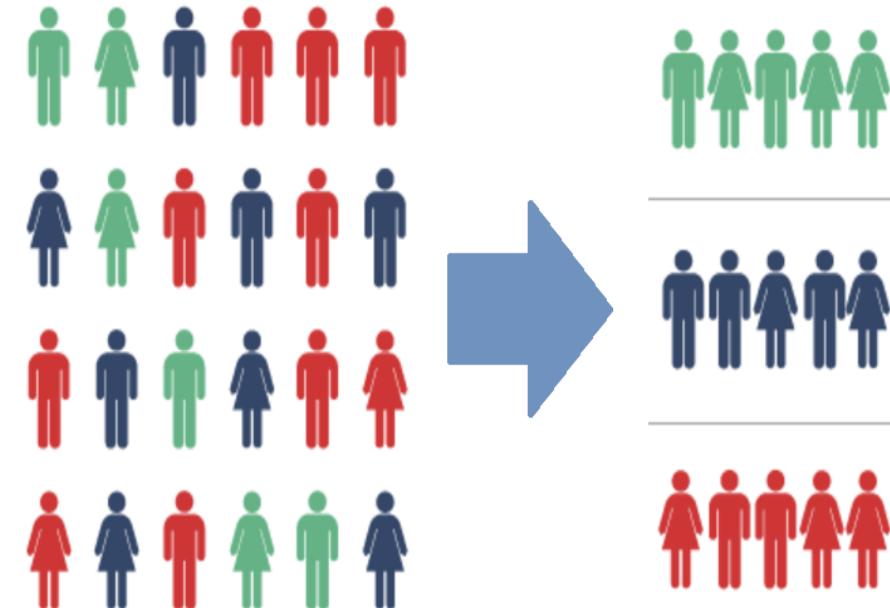
Overview

- 1) Objective & User Segmentation
- 2) Overview
 - a. Jungian Archetypes & Brand Touchstones
 - b. IBM Watson Personality Insights
- 3) User Groups <-> Archetypes
- 4) Hypotheses
- 5) Proposed Validation Methods



Active User Segmentation: Organize, Analyze and Act

“Market segmentation is a marketing strategy which involves **dividing a broad target market into subsets** of consumers, businesses, or countries who have, or are perceived to have, **common needs, interests, and priorities**, and then designing and implementing strategies to target them.”



How might we segment 1 million customers to better engage them?

What do we know about the population?

What motivates them? And why?

How do we begin to segment and organize?

```
graph LR; A[Voice of Customer<br/>(blogs, tweets,<br/>speeches)] --> B[Language & personality<br/>analysis]; B --> C[Traditional Statistics & Segmentation]
```

Voice of Customer
(blogs, tweets,
speeches)

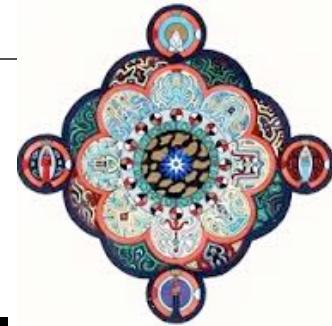
Language &
personality
analysis

Traditional
Statistics &
Segmentation

What Brands have highest / lowest resonance?

... and how can we can **test + validate**?

Twelve Jungian Archetypes



- The Innocent
- The Hero
- The Regular Guy
- The Nurturer
- The Creator
- The Explorer
- The Rebel
- The Lover
- The Magician
- The Ruler
- The Jester
- The Sage

The Innocent

AKA:

optimist, utopian, honest, reliable

DESCRIPTION:

The innocent has an optimistic world view, wants to be happy, and usually thinks the best of others. They are fair, honest, and trusting – though at times can be naïve.

TYPE & ORIENTATION:

Ego > Order

CELEBRITIES:

Elmo, Michael Cera, Dolly Parton, Goldie Hawn, John Denver, Kermit Ed Begley, Jr.



The Hero

AKA:

warrior, rescuer, crusader, athlete

DESCRIPTION:

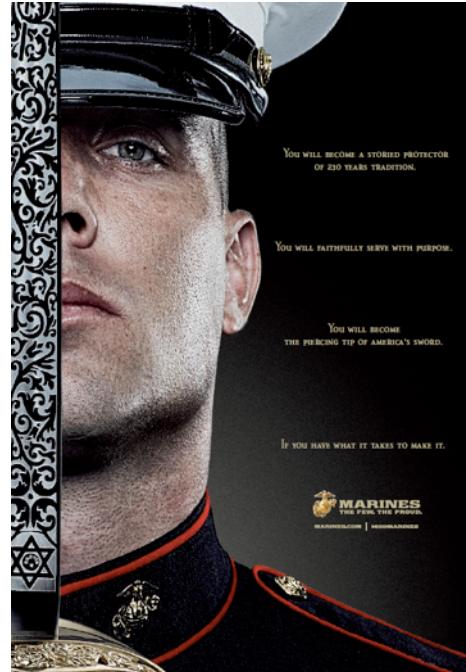
Prepare, act, strive, fight, win! The confident hero pushes hard to save the day. Clear eyed on exactly what needs to be done and how to do it.

TYPE & ORIENTATION:

Ego > Ego

CELEBRITIES:

Daniel Craig, Arnold Schwarzenegger, Captain Sully Sullenberger, Hope Solo, Pink, Teddy Roosevelt



JUST DO IT.



UNDER ARMOUR®



The Citizen

AKA:

everyman, regular-guy, servant

DESCRIPTION:

The citizen is your next door neighbor. A good, solid, self-aware, middle-class, tax-paying member of society. Grass roots, down to earth – and proud of it!

TYPE & ORIENTATION:

Ego > Social

CELEBRITIES:

Jay Leno, Jon Stewart, Tom Hanks, Matt Damon, Reece Witherspoon



The Nurturer

AKA:

healer, angel, caregiver, altruist, helper

DESCRIPTION:

The Nurturer is all about helping others – healing, helping, comforting. She derives her sense of self and purpose from her mission to others.

TYPE & ORIENTATION:

Ego > Social

CELEBRITIES:

Oprah Winfrey, Angelina Jolie, Bono, Jimmy Carter, Kofi Annan



The Creator

AKA:

artist, entrepreneur, visionary, storyteller

DESCRIPTION:

The Creator is confident in how to translate her imagination into reality. The result is all that matters – to create something enduring and of value for future generations

TYPE & ORIENTATION:

Soul > Ego

CELEBRITIES:

Steve Jobs, Steven Spielberg,
Elizabeth Holmes, Wes Anderson,
Margaret Atwood, JK Rowling



The Explorer

AKA:

adventurer, pioneer, seeker

DESCRIPTION:

The Explorer goes forth to seek adventure and experiences! Life is not about having, but about doing and feeling. Exciting journeys leading to new and interesting destinations.

TYPE & ORIENTATION:

Soul > Freedom

CELEBRITIES:

James Cameron, Neil Armstrong, Jane Goodall, Sir Edmund Hillary, Eddie Aikau, Bear Grylls



The Rebel

AKA:

activist, maverick, reformer, gambler

DESCRIPTION:

Don't tell the Rebel what to do, because they are going to do things their way - and shout it from the rooftops! Conventional is boring, and authority sometimes wrong. Shake things up!

TYPE & ORIENTATION:

Soul > Freedom

CELEBRITIES:

Richard Branson, Avril Lavigne, Elon Musk, Miley Cyrus, Sean Penn, Thomas Piketty, Pete Seeger



The Lover

AKA:

hedonist, matchmaker, companion

DESCRIPTION:

The Lover seeks companions and values experiences from special relationships. It's about the connection, fine wines and good chocolate.

TYPE & ORIENTATION:

Soul > Social

CELEBRITIES:

Taylor Swift, Zoë Kravitz, Adele, Prince, Jon Bon Jovi, Elvis, Neil Diamond



TIFFANY & Co.

NEW YORK SINCE 1837



The Magician

AKA:

engineer, shaman, scientist

DESCRIPTION:

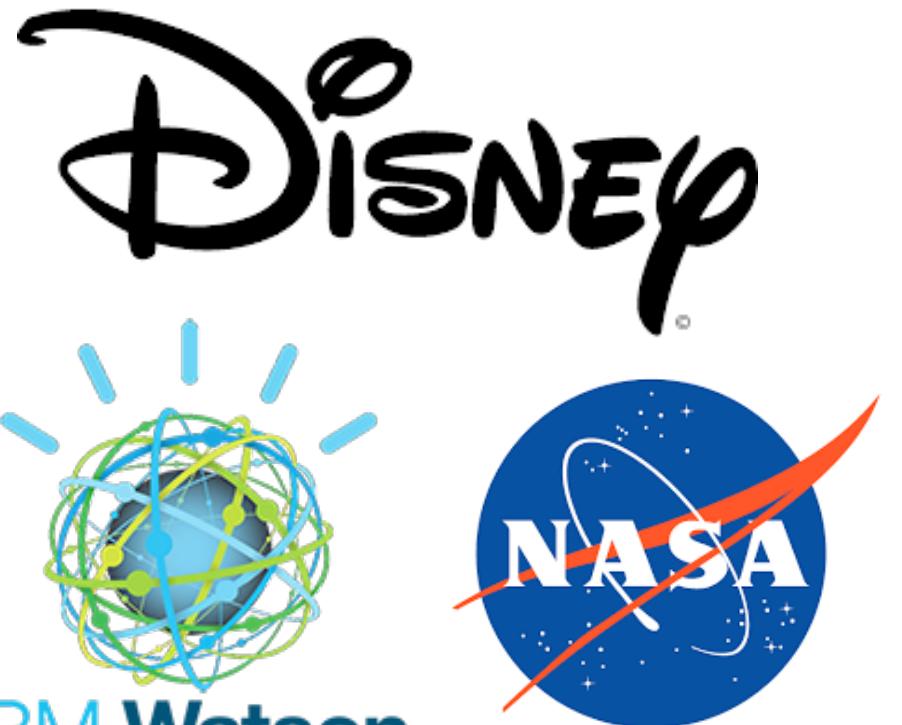
The Magician makes special things happen. With their special knowledge and skills, they build things and change things that (to outsiders) often appears to be magic.

TYPE & ORIENTATION:

Self > Ego

CELEBRITIES:

Malcolm Gladwell, Michael Porter, Marc Andreessen, Rasputen, Nikola Tesla, Walt Disney



The Ruler

AKA:

boss, patriarch, judge, ambassador

DESCRIPTION:

The leader holds the power in the room. The leader speaks and acts with strength and clarity of purpose. They value hierarchy and earn (or demand) loyalty – and the promise of prosperity.

TYPE & ORIENTATION:

Self > Order

CELEBRITIES:

Angela Merkel, The Pope, Bob Iger, Queen Elizabeth, Vladimir Putin, Wayne Gretzky



ROLEX



BENTLEY

**Goldman
Sachs**



The Jester

AKA:

trickster, entertainer, clown

DESCRIPTION:

The Jester is carefree and joyous. Playful and energetic! Why worry too much about the mundane in life – when we can take joy in being playful. Laugh, drink, play and enjoy life!

TYPE & ORIENTATION:

Self > Freedom

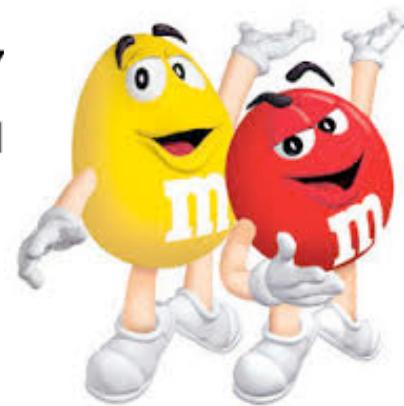
CELEBRITIES:

Jimmy Fallon, Mark Twain, Bill Murray, Steve Carell, Amy Schumer, Will Ferrell, Stephen Colbert



GEICO

**SATURDAY
NIGHT
LIVE**



[adult swim]

The Sage

AKA:

mentor, scholar, shaman, thinker

DESCRIPTION:

The Sage is well read, well informed and well respected. An oracle of knowledge who mentors others to achieve better understanding.

TYPE & ORIENTATION:

Self > Order

CELEBRITIES:

Warren Buffett, Bill Gates, Peter Drucker, Tony Robbins, David Attenborough, Jack Welch, Stephen Hawking

The
Economist

McKinsey&Company

TED
Ideas worth
spreading

**The
New York
Times**

FT
FINANCIAL
TIMES

 **NATIONAL
GEOGRAPHIC**

Summary

Archetype	jungian_aliases	brand_touchstone
The Innocent	utopian, dreamer, romantic, child	Fairtrade, Sesame Street, Hello Kitty, Pampers, Oreo
The Hero	warrior, rescuer, crusader, athlete	US Marines, Nike, UnderArmor, Go Pro
The Citizen	everyman, regular-guy, servant	Budweiser, Walmart, Ford, NASCAR
The Nurturer	healer, angel, caregiver, altruist, helper	Whole Foods, Dove, Salvation Army, J&J, Tylenol
The Creator	artist, entrepreneur, visionary, storyteller	Crayola, Lego, Apple, Moleskine
The Explorer	adventurer, pioneer, seeker	North Face, Red Bull, Subaru, Mountain Dew, REI
The Rebel	activist, maverick, reformer, gambler	Virgin, Tesla, Indian Motorcycle, Obey, Vans
The Lover	hedonist, matchmaker, companion	eHarmony, Lindt, Victoria's Secret, Hallmark, Tiffany
The Magician	engineer, magician, scientist	Disney, NASA, IBM Watson, HBR
The Ruler	boss, patriarch, judge, ambassador	Rolex, Dos Equis, Goldman Sachs, Bentley
The Jester	trickster, entertainer, clown	GEICO, Adult Swim, M&Ms, SNL
The Sage	mentor, shaman, scholar, thinker	Economist, NY Times, National Geographic, TED, McKinsey

Personality Insights

LANGUAGE | GENERAL AVAILABILITY



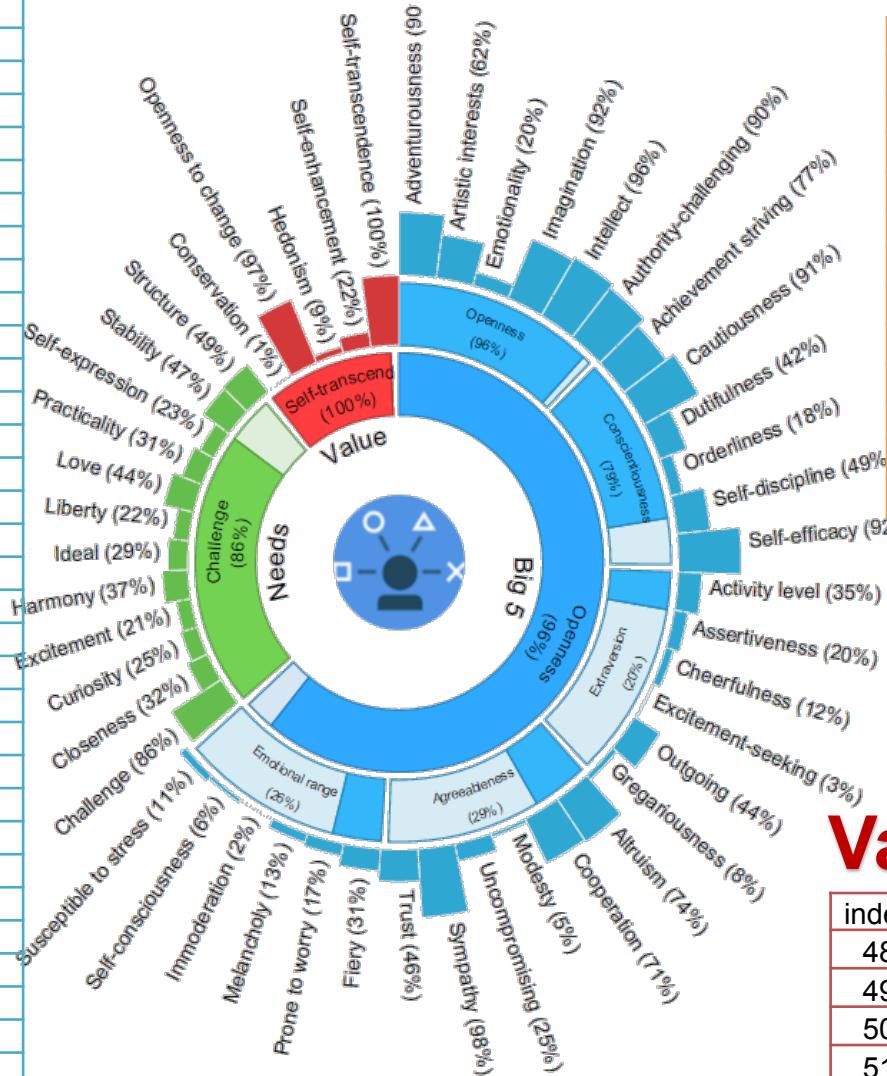
Uncover a deeper understanding of people's personality characteristics, needs, and values to drive personalization.

- IBM Watson Personality Insights extracts and analyzes a **spectrum of personality attributes** to help discover actionable insights about people and entities, and in turn guides end users to highly personalized interactions. The service outputs personality characteristics that are **divided into three dimensions: the Big 5, Values, and Needs**
- Personality Insights can also help with **market segmentation and individualizing campaigns** or promotions and can also be used to help recruiters or university admissions match candidates to companies or universities.
- <http://www.ibm.com/smarterplanet/us/en/ibmwatson/developercloud/>

52 Signals: Big Five, Needs and Values

Big Five

index	model	trait
1	Big 5	Achievement striving
2	Big 5	Activity level
3	Big 5	Adventurousness
4	Big 5	Agreeableness
5	Big 5	Altruism
6	Big 5	Anger
7	Big 5	Anxiety
8	Big 5	Artistic interests
9	Big 5	Assertiveness
10	Big 5	Cautiousness
11	Big 5	Cheerfulness
12	Big 5	Conscientiousness
13	Big 5	Cooperation
14	Big 5	Depression
15	Big 5	Dutifulness
16	Big 5	Emotionality
17	Big 5	Excitement-seeking
18	Big 5	Extraversion
19	Big 5	Friendliness
20	Big 5	Gregariousness
21	Big 5	Imagination
22	Big 5	Immoderation
23	Big 5	Intellect
24	Big 5	Liberalism
25	Big 5	Modesty
26	Big 5	Morality
27	Big 5	Neuroticism
28	Big 5	Openness
29	Big 5	Orderliness
30	Big 5	Self-consciousness
31	Big 5	Self-discipline
32	Big 5	Self-efficacy
33	Big 5	Sympathy
34	Big 5	Trust
35	Big 5	Vulnerability



Needs

index	model	trait
36	Needs	Challenge
37	Needs	Closeness
38	Needs	Curiosity
39	Needs	Excitement
40	Needs	Harmony
41	Needs	Ideal
42	Needs	Liberty
43	Needs	Love
44	Needs	Practicality
45	Needs	Self-expression
46	Needs	Stability
47	Needs	Structure

Values

index	model	trait
48	values	Conservation
49	values	Hedonism
50	values	Openness to change
51	values	Self-enhancement
52	values	Self-transcendence

Big Five personality traits

The **Big Five personality traits**, also known as the **five factor model** (FFM), is a widely examined theory of five broad dimensions used by some psychologists to describe the human personality and psyche.^{[1][2]} The five factors have been defined as openness to experience, conscientiousness, extraversion, agreeableness, and neuroticism. Acronyms to aid in remembering the five traits include **OCEAN** and **CANOE**. Beneath each proposed global factor, a number of correlated and more specific primary factors are claimed. For example, extraversion is said to include such related qualities as gregariousness, assertiveness, excitement seeking, warmth, activity, and positive emotions

Source: https://en.wikipedia.org/wiki/Big_Five_personality_traits

Big Five

Big Five is one of the best studied of the personality models developed by psychologists ([Costa & McCrae, 1992](#), and [Norman, 1963](#)).

It is the most widely used **personality model to describe how a person generally engages with the world.**

The service computes **the five dimensions and thirty facets** of the model that were described earlier in this documentation

- O stands for Openness,
- C for Conscientiousness,
- E for Extraversion,
- A for Agreeableness, and
- N for Neuroticism (Emotional Range)

1	Achievement striving
2	Activity level
3	Adventurousness
4	Agreeableness
5	Altruism
6	Anger
7	Anxiety
8	Artistic interests
9	Assertiveness
10	Cautiousness
11	Cheerfulness
12	Conscientiousness
13	Cooperation
14	Depression
15	Dutifulness
16	Emotionality
17	Excitement-seeking
18	Extraversion
19	Friendliness
20	Gregariousness
21	Imagination
22	Imm Moderation
23	Intellect
24	Liberalism
25	Modesty
26	Morality
27	Neuroticism
28	Openness
29	Orderliness
30	Self-consciousness
31	Self-discipline
32	Self-efficacy
33	Sympathy
34	Trust
35	Vulnerability

Needs

Needs are an important aspect of human behavior. Research literature suggests that several types of human needs are universal and **directly influence consumer behavior** ([Kotler & Armstrong, 2013](#), / [Ford, 2005](#)).

The **twelve categories** of needs that are reported by the service are described in marketing literature as desires that a person **hopes to fulfill when considering a product or service.**

E.g. **Curiosity**: the desire to discover and learn, curiosity for its own sake.

Needs

index	trait
36	Challenge
37	Closeness
38	Curiosity
39	Excitement
40	Harmony
41	Ideal
42	Liberty
43	Love
44	Practicality
45	Self-expression
46	Stability
47	Structure

Values

Values convey what is most important to an individual. They are "desirable, trans-situational goals, varying in importance, that serve as **guiding principles** in people's lives" ([Schwartz, 2006](#)).

- values are beliefs;
- values are a motivational construct;
- values transcend specific actions and situations;
- values **guide the selection or evaluation of actions**, policies, people, and events; and
- values vary by relative importance and can be ranked accordingly. The service computes the five basic human values proposed by [Schwartz, 1992](#)).

E.g. **Self-transcendence** - Show concern for the welfare and interests of others.

Values

index	trait
48	Conservation
49	Hedonism
50	Openness to change
51	Self-enhancement
52	Self-transcendence

Next, we want to MAP our existing user types to 12 Jungian Archetypes

Gwen



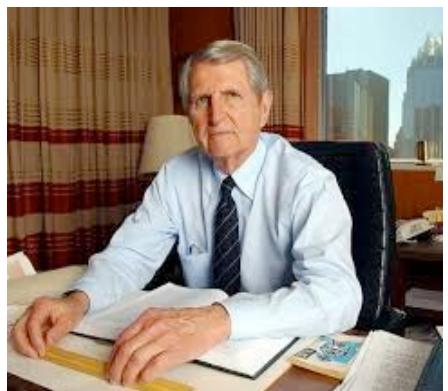
Bonnie



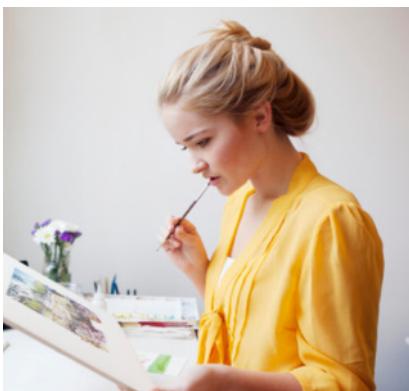
Robert



Michael



Paul



Ann



Ryan



Matt

We only have 8 existing types, so we need to create 4 more to map 1:1

Zoe



Steven



Richard



Heather



Zoe (talented teacher)



- **Story:** Kindergarten teacher, optimist, sees best in kids and parents
- **Big Five (top 5):**
 - Trust
 - Friendliness
 - Morality
 - Sympathy
 - Dutifulness
- **Needs:** Ideal
- **Values:** Self-transcendence



THE INNOCENT

Michael (massively motivated)



- **Story:** Business owner, body-builder, motivated and energetic
- **Big Five (top 5):**
 - Achievement striving
 - Assertiveness
 - Activity level
 - Self-discipline
 - Excitement seeking
- **Needs:** Challenge
- **Values:** Self-enhancement



THE HERO

Matt (mellow musician)



- **Story:** Schoolteacher, evenings he jams with band. Creative. Easygoing.
- **Big Five (top 5):**
 - Modesty
 - Cheerfulness
 - Trust
 - Cooperation
 - Friendliness
- **Needs:** Self-Expression
- **Values:** Hedonism



THE CITIZEN

Steven (super supportive)



- **Story:** Computer Programmer, Volunteers at food bank and community events. Mentors.
- **Big Five (top 5):**
 - Altruism
 - Sympathy
 - Trust
 - Dutifulness
 - Cheerfulness
- **Needs:** Love
- **Values:** Self-transcendence



THE NURTURER

Ann (aspiring artist)



- **Story:** Quirky artist, creative, introspective, has her own art studio
- **Big Five (top 5)**
 - Artistic interests
 - Imagination
 - Immoderation
 - Vulnerability
 - Emotionality
- **Needs:** Self-Expression
- **Values:** Self-Enhancement



THE CREATOR

Bonnie (bold and brave)



- **Story:** Adventurer, risk taker, confident, argumentative,
- **Big Five (top 5)**
 - Adventurousness
 - Assertiveness
 - Excitement-seeking
 - Immoderation
 - Activity level
- **Needs:** Excitement
- **Values:** Hedonism



THE EXPLORER

Richard (rowdy rambler)



- **Story:** He's rowdy and sometimes has a temper.
Dropped out of university and bought an old motorbike.
Cross country couch surfing
- **Big Five (top 5)**
 - Immoderation
 - Excitement-seeking
 - Adventurousness
 - Anger
 - Liberalism
- **Needs:** Liberty
- **Values:** Hedonism



THE REBEL

Heather (happy hearted)



- **Story:** Manager at accounting firm, hoping to find Mr. Right soon. A romantic.
- **Big Five (top 5)**
 - Self Consciousness
 - Emotionality
 - Sympathy
 - Friendliness
 - Cooperation
- **Needs:** Love
- **Values:** Self-enhancement



THE LOVER

Ryan (resourceful researcher)

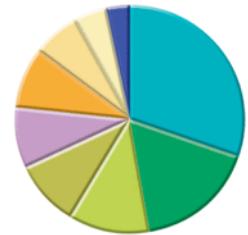


- **Story:** Programmer, life-long learner, technophile
- **Big Five (top 5)**
 - Intellect
 - Adventurousness
 - Achievement Striving
 - Imagination
 - Activity-Level
- **Needs:** Curiosity
- **Values:** Openness to change



THE MAGICIAN

Robert (rational & rude)



- **Story:** He's an assertive, intellectual, confident, and opinionated manager. Not well loved, but in charge.
- **Big Five (top 5)**
 - Orderliness
 - Assertiveness
 - Discipline
 - Anger
 - Morality
- **Needs:** Structure
- **Values:** Conservation



THE RULER

Gwen (guitar giggler)



- **Story:** Learning guitar, practical joker, a good heart – volunteers at food bank
- **Big Five (top 5)**
 - Artistic Interests
 - Friendliness
 - Immoderation
 - Altruism
 - Gregariousness
- **Needs:** Harmony
- **Values:** Self-transcendence

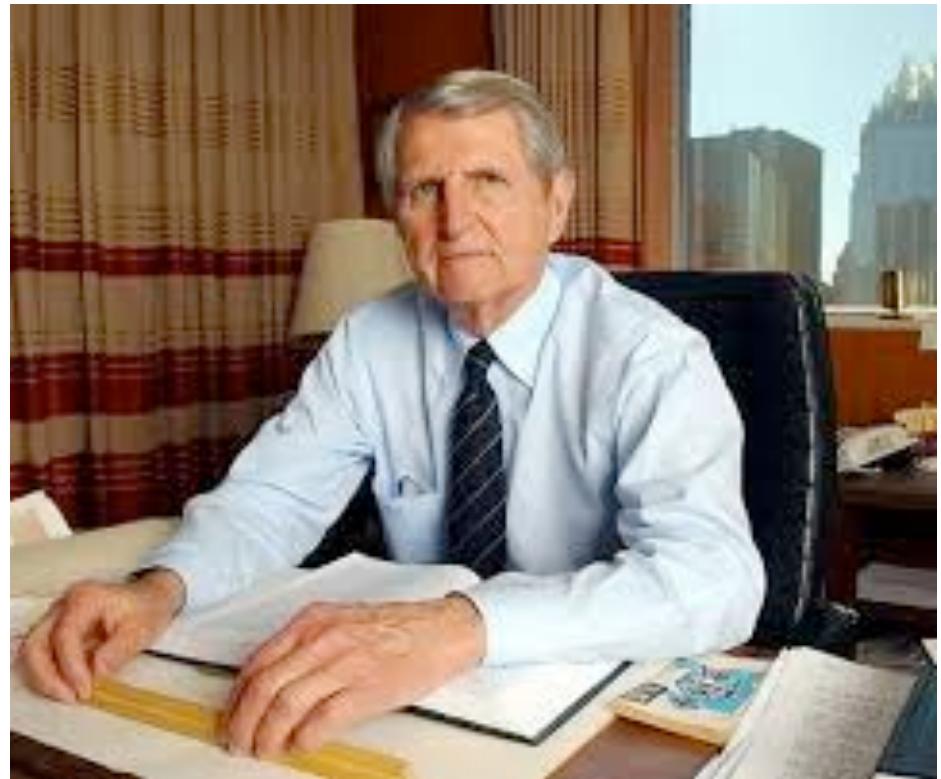


THE JESTER

Paul (proper professional)



- **Story:** Law firm partner, father, well read, organized, does some pro-bono work
- **Big Five (top 5)**
 - Achievement Striving
 - Dutifulness
 - Self-discipline
 - Morality
 - Assertiveness
- **Needs:** Structure
- **Values:** Conservation



THE SAGE

Initial Mapping Complete



The Innocent



The Hero



Regular Guy



The Nurturer



The Creator



The Explorer



The Rebel



The Lover



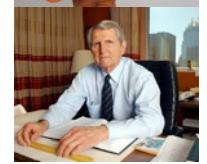
The Magician



The Ruler

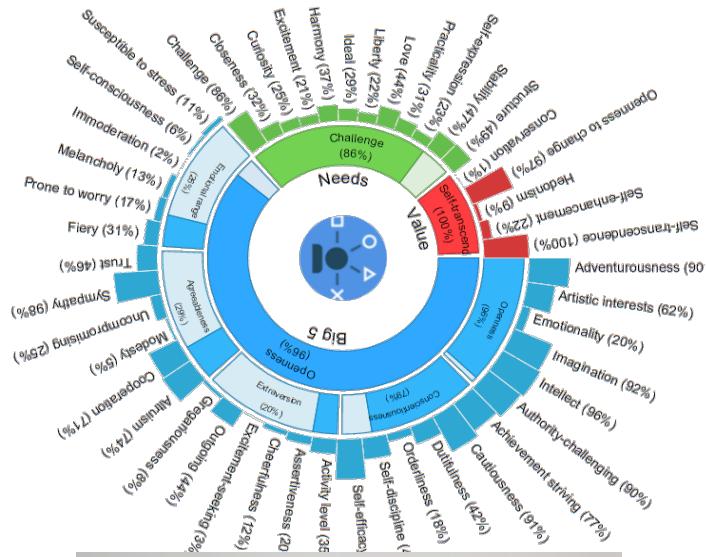
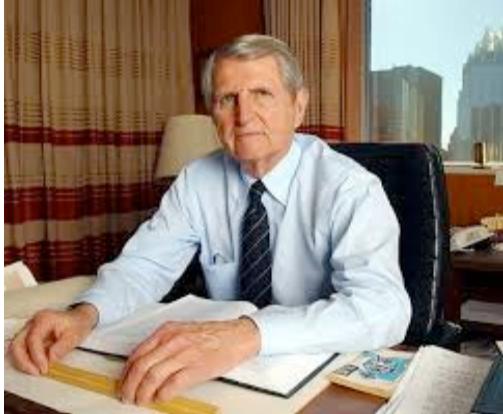
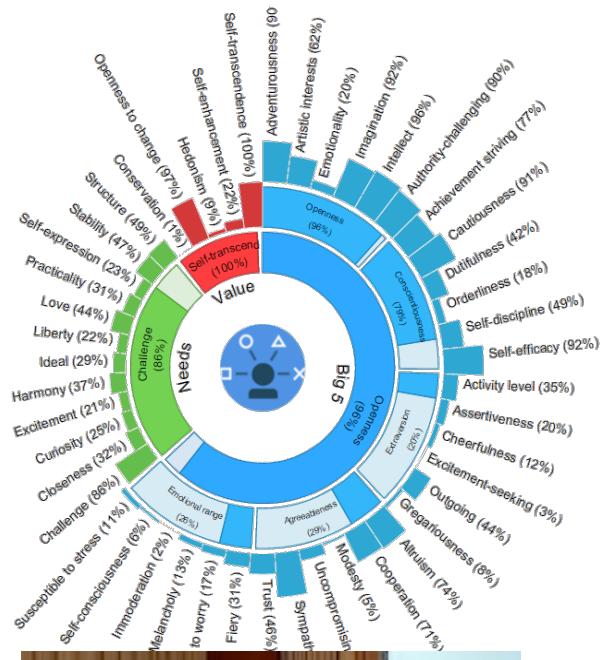


The Jester



The Sage

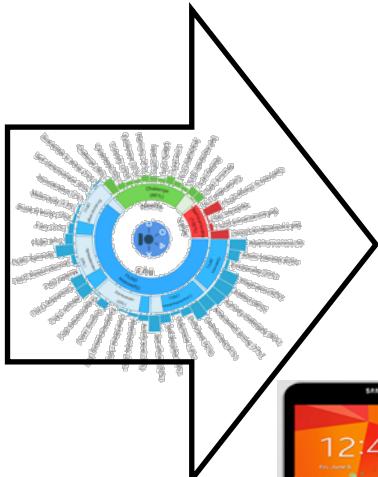
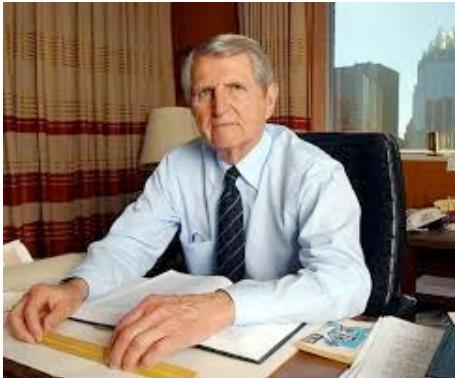
We can segment our base according to criteria, design experiments, then measure...and **test / validate** hypotheses!



Marketing a tablet to Paul & Gwen?

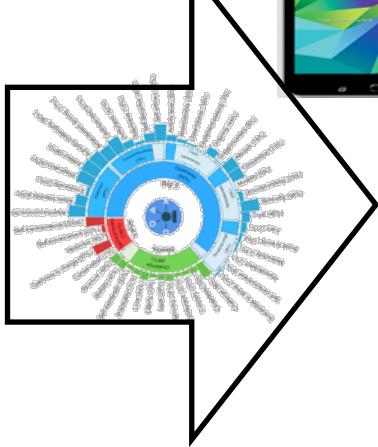
This is NOT one size fits all messaging...

Paul



The Samsung Galaxy is a **precision** tablet with a **crisp** user interface. **Organize** your tasks and icons with icon grouper. A great tablet for home or business use – and with a quad core - peak **performance** and **responsiveness** can keep pace with you.

Gwen



Juggle tasks at work and enjoy movies at home with a tablet that is portable enough for your commute and powerful enough to keep up with your busy schedule. The quad-core processor provides quick performance that your entire family will enjoy.

The Samsung Galaxy is a **flexible** tablet with a **beautiful** user interface. **Curate** and **edit** your **photos** and **music** with ABC. A great tablet to organize your life and your content. And with a quad core – your media and music will look and sound **marvelous**.

Mapping Traits:

Developing....

Brand & Message Harmony

Developing....

Getting it Right

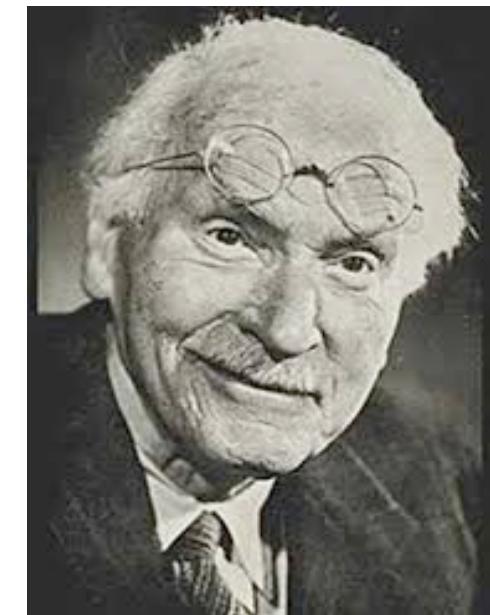
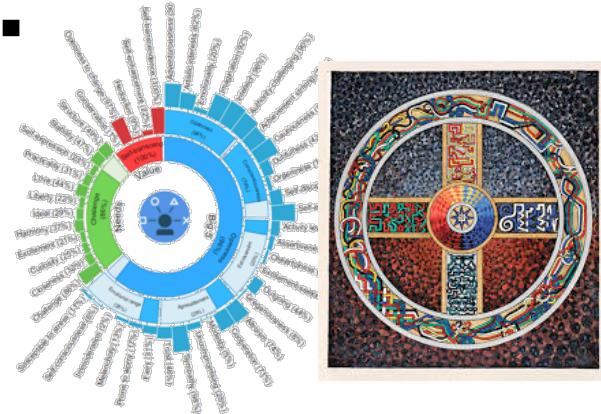
- Successful Segmentation**
- Brand Harmony**
- Message Harmony**

Discordance & Mismatches

- When might we expect it?**
- How can we recognize / avoid it?**

Three Key Take-Aways:

- 1) FRESH PERSPECTIVE:** Many ways exist to segment customers – like Jungian Archetypes.
- 2) BRANDS:** Brands, like people, have an identity – a resonance. And so do messages. Brand identities can help set up initial hypotheses.
- 3) MAPPING:** Conventional measures and methods can be mapped and then tested/validated to see if effective for positive outcomes



Info Sources and Other Reading

1. https://en.wikipedia.org/wiki/Jungian_archetypes
2. http://www.soulcraft.co/essays/the_12_common_archetypes.html
3. <http://www.sparkol.com/engage/the-12-brand-archetypes-all-successful-businesses-are-built-on/>
4. <https://visualbloke.wordpress.com/2012/01/26/jung-archetypes-and-branding/>
5. <http://www.formalifesciencemarketing.com/wp-content/uploads/2014/01/Archetypes-flowchart.pdf>
6. <http://www.zekreative.com/Blog/Brand-Storytelling-through-12-archetypes>
7. <http://www.ibm.com/smarterplanet/us/en/ibmwatson/developercloud/doc/personality-insights/science.shtml>
8. <http://www.inc.com/young-entrepreneur-council/is-your-brand-a-rebel-lover-or-hero.html>

PART TWO WILL EXPLORE LINKAGES & WEIGHTS
ALONG ALL DIMENSIONS OF JUNGIAN
ARCHETYPES & PERSONALITY INSIGHTS TRAITS
AND PROPOSED EXPERIMENTS TO VALIDATE FOR
THE AVAILABLE DATA SET (TWITTER & BLOGS)

**DRAFT
DISCUSSION
PAPER
(work in progress)**