



The Uber Framework! The quickest route to joined up thinking about theory in qualitative market research

Helps develop a theoretical viewpoint that can link context, emotions, motivations, biases and behaviour

What makes this possible?

Evolutionary psychology has become a single seamless framework that can span disciplinary divides. ([Dunbar 2008](#)). It can provide ultimate explanations by considering the adaptive value of the systems of thinking and behaviour that we have successfully evolved. These explanations add power and depth to the proximate explanations generated by other disciplines.

The ancestral environment in which early humans spent over 160,000 years as semi-nomadic bands of hunter gatherers, shaped our instinctive reactions to the challenges of survival and passing on genes to the next generation. These reactions remain embedded in us as systems or subselves that are triggered by environmental cues, often out of our immediate conscious awareness. They now work within the context of the modern environment, which is physically, socially and culturally different

- Our brains now evolve rapidly through the transmission of learning rather than genes
- Many people choose not to have children, so passing genes on is no longer the arbiter of success.
- Companies and societies evolve and adapt as well as people. Companies and cultures create norms to maintain fitness for their environment



Evolutionary patterns of behaviour are a default option and help to explain behaviour that otherwise does not make sense e.g. 'irrational' cognitive biases. Biases such as loss aversion make huge sense when people are living at subsistence level, because then any loss can lead to death. The system defaults can be described as [Threat management](#) or [Error management](#) – keeping us away from evolutionarily costly mistakes, at the risk of smaller misjudgements.

There is no moral judgment intended in the descriptions of the evolutionary processes; just because they are 'original' and 'natural' does not imply they are the best. They can be distinctly maladaptive in different circumstances. Once aware of them, humans have the thinking capacity to make different choices.

We all do Evolutionary Marketing!

Our task is not just to survive but to do it well – to have access to resources, control over the environment, to increase the quality of the genes we pass on by choosing a better mate. To achieve this we have to attract support from others – friends, co-workers, family and of course (sexual) mates. According to Miller¹, people have evolved to market themselves to one another. Bodies, clothes, behaviours and products are advertisements for our genes. Men have sales tactics; promotions to make themselves look resourceful and viable as mates, while women are experts in the art of relationship management to help promote investment in their offspring.

In short we all have inbuilt needs to keep other people interested in us. We need loyalty, affiliation, respect, affection – or at the very least to give what we think is a positive impression of our traits and characteristics, a good reputation. [Signalling theory](#) assumes this as an underlying motive for much behaviour. Not just the obvious displays of consumption to show wealth or ‘cool’, but anything that can let others know our physical, mental or moral superiority or ‘fitness’. For academics it might be citations and tenure, for mothers it might be the quality of care for their children. We all tend to focus on something that makes us feel special– even if it’s espousing Linux instead of Windows.

The implication is clear: almost everything we do, that is not for purely private pleasure seeking, has an important component of “making a statement about me”. It may be exaggerated or deceptive (Toyota Prius owners are less concerned with the environment than it appears) or it may be altruistic. But even altruism can be seen as a signal of great status – you are so wealthy you can afford to give it away.

How to use the Uber framework in Qualitative Market Research (QMR)

1. Start by considering the utilitarian, emotional and social aspects of the product or service.

It is rare for a client to not be concerned with product features and benefits, but just listing them in order of influence on a purchasing decision is missing a trick. A quick Laddering process will create some hypotheses about the social and emotional importance of these benefits. (*Why is it important that the dishwasher should be quiet?*) Then check – what might the product or behaviour be signalling, and to whom? Is there a [reference group](#) (a group to which people will compare themselves?) This group will determine social norms, expectations, benchmarks. Whether the individual actually belongs to it, or wants to belong to it, their thinking, identity, social roles and self-esteem will be affected by the results of the comparison they make. As Mark Earls continually points out – human beings imitate others – but only if they are members or aspirants of that reference group.

¹ Geoffrey Miller, *Spent – Sex, Evolution and Consumer Behaviour*, Penguin, 2009

Most subjects we research will serve two sets of needs. The balance will be different. Some need to mainly meet internally derived criteria e.g. buying insurance, buying a chocolate bar for yourself, water filters, screwdrivers, headache tablets, train tickets. You might ask the opinion of others, and you might judge yourself, but you will not expect others to judge you on your purchase.

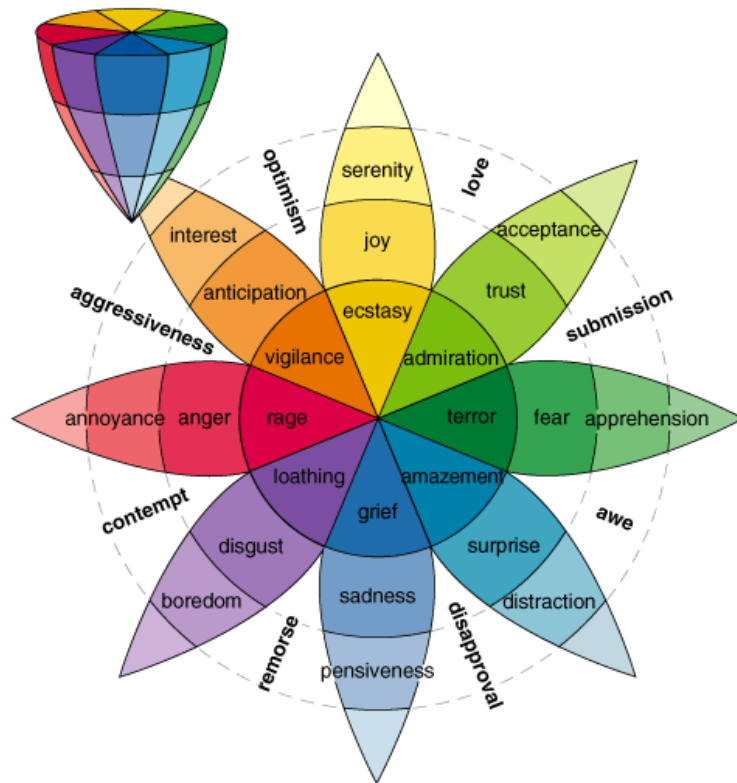
Whereas almost anything that is displayed on the person, in the home, or anywhere that you interact with people, will have a signalling function to others. 'Badge brands' are only the start – the most obvious. That quiet dishwasher? It shows how considerate and caring you are of others in your home. It shows your neighbour that you are competent at choosing home appliances, you keep up to date and you have the disposable income. You feel more confident going for coffee to the woman who has the impressively large and expensive kitchen. Whose house you secretly envy – although your taste is better.

Inner needs, utilitarian, personal pleasure and satisfaction, self-fulfilment. Not visible or significant to others	<i>There is an overlap; often both have to be taken into account</i>	The outer, socially defined, signalling to others
Some examples of relevant theories	<i>Brands transform utilitarian benefits and experience and act as social signals</i>	Some examples of relevant theories
<ul style="list-style-type: none"> • Basic Maslow states – hunger, cold, thirst, fear, safety. Plus the higher ones – aesthetic and cognitive, but any of them may have social ramifications. • Other theories of drives and needs (e.g. McClelland, Herzberg) • Emotions • Habit formation and change • Behaviourist notions of association and reward to shape behaviour and loyalty to brands • Behaviour change models • Cognitive biases in awareness, processing and valuing information (System 1 and 2) • internalised standards and internal dialogues (Parent/Adult/Child -TA) or Id, Ego and Superego • Laddering benefits, transformation of experience • Models of Persuasion • Different types of trust and how it's won and lost 	<ul style="list-style-type: none"> • E.g. Aaker's Brand equity model includes awareness as an anchor, associations to differentiate it and create positive feelings • Impressive and expressive/social adaptive functions of brands (Franzen) • Values of brands (Sheth & Lai) identity and personality, to resonate with consumers • Brands as relationships – implied contracts to deliver a service, function, or experience for a price/transformations using a form of charisma or cultural meaning (Chandler and Owen) <p>Self-esteem is a personal evaluation of worth, affected by perceptions of others</p>	<ul style="list-style-type: none"> • Maslow's' esteem and belongingness needs • Norms, conformity, affiliation • Costly signalling theory (conspicuous precision, waste, reputation, cost - luxury brands) • Gender differences • Reference groups that you belong or aspire to → social judgement → affiliation behaviours ('Mark Earls' Herd') → self-perception; • Creating narratives about the self that require transformation or completion • Roles – sets of beliefs and behaviours, obligations and norms, socially conceptualised. • Enclothed cognition – 'clothing makes the man' you become the person you dress as, because others treat you differently • In-groups and outgroups; stereotyping, prejudice and discrimination

2. Use the concept of Need States and consider the less intense emotions

The context /environment gives a big clue as to which systems will be activated. Some authors called them Subselves; that may sound too permanent, but the concept of [Need States](#) can be applied instead. Need states are context based and can be more fleeting.

There are both positive and negative aspects to the systems and the emotions involved. For example, disease avoidance also leads to concepts of morality and purity. The benefits of affiliation are tempered by the need to avoid frauds and cheaters who could betray friendship and trust. Equally the systems/subselves are not exclusive – the same behaviour may meet different sets of evolutionary goals. For example, status, affiliation and mate acquisition are all connected.



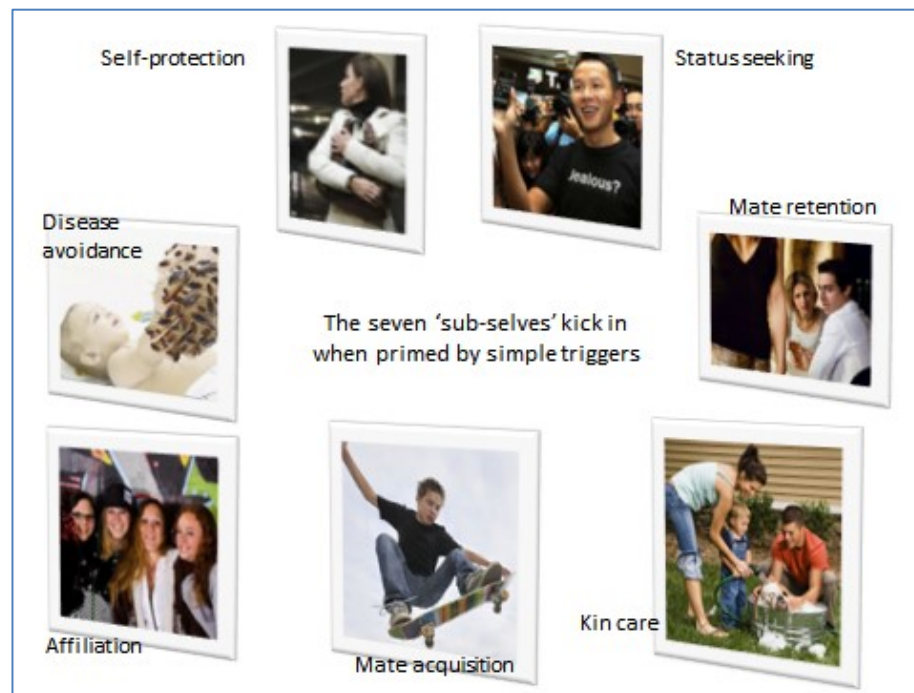
Because emotions evolved as part of the adaptive unconscious, it is logical to link them to the systems/subselves. Some of the systems evoke quite specific emotions; others cover a broad range. Emotions also vary in their intensity and how long they last. It is inappropriate to assume that most consumer products evoke pure and strong emotions. [Plutchik's theory](#) (left) is useful because it not only shows how emotions become milder away from the core, but also how mixtures of emotions create new ones (between the 'petals').

3. You can still work with the individual, social and cultural Functions of emotions

Emotions have an individual, **intra-personal function** – they enable us to act quickly without thinking; shutting down some systems and enhance others to prepare us for action. (The action may or may not occur, depending on the context.) They influence thoughts and memories – the most powerful memories are the emotionally laden ones. They also motivate future behaviours, giving us experiences that we may seek to have again – or to avoid.

But there is also an **interpersonal** function – they are social signals about what individuals are feeling and what they may do. Other people are tuned in and will react accordingly.

Emotions have a social and cultural function. Smiles reward behaviour in others; frowns decrease it, while expressions of disgust will create avoidance. Individuals are members of multiple groups, with multiple social roles, norms, and expectations. There is potential for chaos, and it is the role of culture to provide rules and organisation that maintains social order. The social practices, values and beliefs of the culture regulate the expression of emotion and there are sanctions against those who express emotions inappropriately.

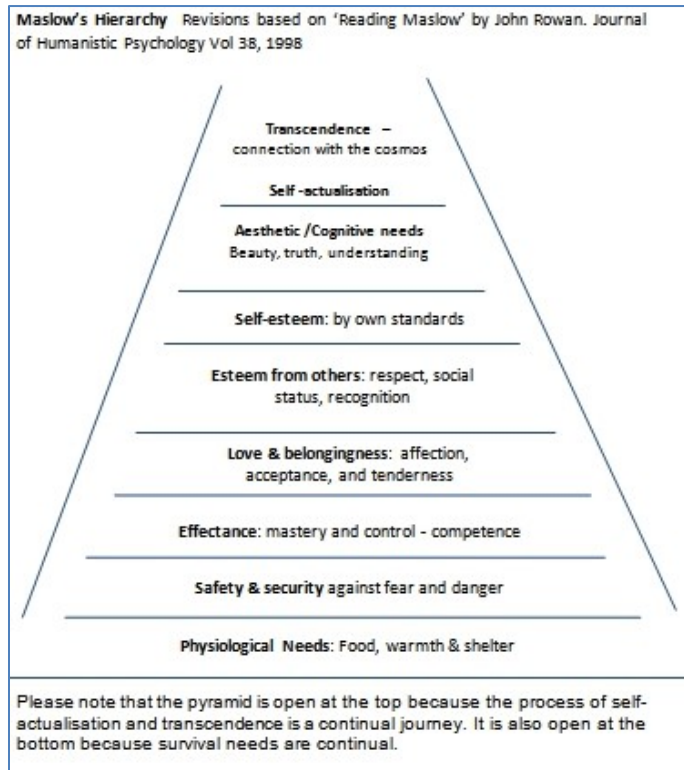


4. The systems/subselves are clearly linked to motivations

If you like to use a version of Maslow for thinking about motivations, there is one overpage. At the lower levels there is a good deal of correspondence between the two frameworks in terms of safety and security, love and belongingness and mastery/effectance.

They diverge somewhat in mate acquisition, retention and kin care, which are all very complex. So although Maslow aimed to create one framework that included a range of theories, it is helpful to refer to additional ones, such as

- [McClelland's](#) drives for Achievement, Power and Affiliation,
- expressions of [Attachment](#)
- [Herzberg](#) for a work context
- [Attribution](#) theory
- [Human Givens](#).



Maslow is more useful if you think of interpreting each level in terms of **deficiency and abundance**.

So physiological needs are not just about filling a deficiency of food or warmth – they can be luxuriating in the abundance of food and warmth. Some people seek to escape danger – others seek it for stimulation.

People need a sense of mastery and competence in their everyday lives, but some people seek to control others. Some will seek to explore the spiritual for self-understanding; others may turn to drugs to transcend reality for a different reason.

Maslow is also a useful format for thinking about how brands meet the consumer's needs – at what level/s and in what ways.

5. There are typical modes of thinking and behaviours connected with each of the systems.

Again, this is simpler in self-protection, disease avoidance, affiliation and status seeking, since the other systems involve a wider range of behaviours. But there are some typical cognitive biases and heuristics that apply, in each scenario.

6. Use the following charts to hypothesise what might be going on within the domain you need to research.

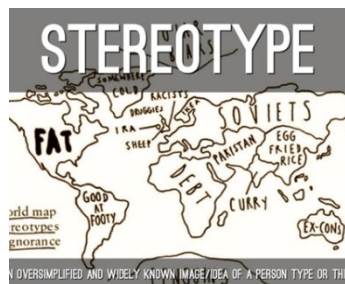
Start with the context and see what else fits, or you may be able to work from the emotions you have uncovered or the behaviour you have observed. In theory, it is all interlinked.



Self Protection (origin of system/subself: attacks by predatory groups, tribes animals)

Note that this includes psychological threats/anxieties, and that some people seek the excitement of fear inducing behaviour. Sources of fear/anxiety in the US and Europe include: Terrorist attacks, spiders, death, failure, war, heights, crime/violence, being alone, the future, public speaking, misery, ridicule and rejection.

Context & triggers to activate systems /subselves / Need state/s	Emotions, feelings and moods (different strengths and durations)	Body response/ facial cues / signals to others	Likely modes of thinking Cognitive biases	Options for behaviour	Motivations /Desired effect	Effect of resolution
Threat in physical environment or in imagination	Terror Fear Apprehension Discomfort	Rapid breathing and heart rate Sweating, Muscles tense to run faster of fight harder	Black and white judgments, stereotyping Blaming Manipulation In-group bias	Stress response: 'Fight' / confront Aggression, violence, bluster, posturing, loss of control	Maslow's safety needs: Escape/ remove danger and pain	If successful; Relief, Joy, sense of competence
Conditioned trigger					OR seek the thrill of danger	If not successful: resentment, humiliation, desire for revenge
Immediate or as concern for the future	Rage Anger Annoyance	Wide eyes to take in more information/ track target	Social proof	Flight/ distance Avoid, run away, repress	Seek comfort, trust protection	Or depression and health issues due to stress
Obstacle/enemy	Not coping: Embarrassment, shame, remorse	Eyebrows slanted upwards	Anticipation –playing out scenarios	Freeze /when no hope	Seek reassurance from others of own worth	
Perceived loss of safety		Mouth open to take in more air	Problem solving to overcome obstacles	Seeking powerful allies		
Possible loss of self-esteem e.g. humiliation	Fear as excitement: Vigilance Anticipation Interest	Chronic fear /anxiety leads to stress response and panic attacks	Negative thought cycles about self worth	May seek revenge	Social/cultural: safety in numbers, greater unity (but also manipulation through fear)	



Disease Avoidance — ‘the behavioural immune system’ (system source: illness from parasites, pathogens, food/environment, foreigners bringing plagues and diseases) **Sexual disgust** arises from a desire to avoid poor mating choices and **moral disgust** from avoidance of social relationships with norm violating individuals

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Cues of risk of contact with pathogens	Loathing Disgust Aversion	slightly narrowed brows, a curled upper lip, wrinkling of the nose and visible protrusions of the tongue	Aversion, contempt, disapproval e.g. drug users, homeless, obese	Withdrawal, distancing, stopping or dropping the object of disgust and shuddering	Maslow’s Safety needs – protection, long term survival and growth	Sense of safety, righteousness, virtue, respectability
Body wastes/ contents / sick, deformed, dead, unhygienic, decaying contaminated	Vigilance Anticipation Interest - some people are fascinated by it / source of humour	Lowered blood pressure and galvanic skin response, Nausea /vomiting	In-group vs outgroup Risk aversion - contamination Dehumanisation Stereotyping, prejudice, bigotry Racism/ homophobia	Keeping away from, keeping out, ejecting Socially condemning the ‘impure’ Ritualising beliefs that counter disgust	Stopping the reach of pathogens, the moral infection Expelling ‘contaminated’ people from the group	If not resolved, obsessive compulsive behaviour
The unknown /exotic/ unfamiliar	Maintaining physical and moral health:					
Immoral acts (can be culturally defined)	Admiration Trust acceptance		Following social norms and expectations	Rules for eating, cleanliness and behaviour to keep society physically and morally healthy		
Also: cleansing, grooming, purity, hygiene, wellness, cultural rules						



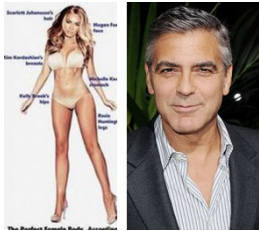
Affiliation — ‘we are better together’ (system source: co-operative groups are more successful and have access to more resources and more protection). It’s not all warm and lovely; there is rejection, shame, sensitivity to betrayal and the manipulation of people by large groups.

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Cues of friendship – photos, cards, social media etc.	Admiration Trust Acceptance Envy	Laughing, smiling, nvc rapport building	Conformity, groupthink Rule following, false consensus	Collaboration more than competition Share, help, support, advise	One of McClelland’s three drives (achievement, affiliation & power)	Increase social bonding , loyalty commitment,
Needs for help, feeling lonely or rejected, membership of organisations	Embarrassment, shame, remorse, at transgression	Group emotions and emotional contagion	Illusions of superiority OR Social comparison with similar others to evaluate self	Follows the group Tend and befriend – female response to stress	Shame is part of Adler’s inferiority drive – leads to compensation	Closeness (people and brands) harmony, convergence
Positive reference (a group you want to be a member of)	Need to affiliate varies according to circumstances	Oxytocin promotes affiliative behaviour, including maternal tending and social contact with peers	Avoidance of high risk or uncertainty	Gossip, maintaining connections, spending time together.	Maslow’s belongingness – need to matter to others, significant to be part of something larger than the self /community	Increase individual effectiveness and validation
Group tasks	Use of social emotion regulation strategies – who to affiliate with / what purpose (coping, task management, status etc.)	Affiliation reduces biological stress responses	Community, Formation of alliances	Communicating, gifting, ‘socialising’		Increased coping and resilience
Known people who need help/are upset			Sensitivity to betrayal	Using crowd opinion and behaviour as choice heuristic		Possibly increased status, reflected glory
						Herd and collective behaviour



Status seeking — ‘fitness enhancement for the individual and the group’ (system source: dominant individuals have better access to quality mates and resources, optimising the overall fitness for survival of the group.) There are different routes to obtaining status – not just dominance, skill or having the most toys. Lack of status can lead to depression / aggression.

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Symbols of power, prestige and success (within a significant setting or reference group).	<u>Different paths:</u> 1. Authentic pride, achievement, high genuine self esteem	Verbal and Non-verbal indications of dominance or inferiority, power and respect	Self-serving biases can increase confidence Some strategies are affiliative – based on ability, generosity and number of allies: appear competent be prosocial, be well connected	‘Conspicuous’ consumption, showing off goods, lifestyle or knowledge Enhancing reputation extravagant use of resources, gifts	Achievement motive Maslow’s Mastery and Effectance Control of environment/ others	Longevity, health, happiness and wealth are all related to social standing - Van Rossum Whitehall Study 2000
Criteria are culturally mediated; include competition, knowledge and skill competency	2. Hubristic pride, narcissism, superiority and arrogance	Use of space and resources is a social signal – big cars, offices, houses etc.	Some are bullying – intimidation, coercion and fear	Banter, queen bees, pecking order, deference		
Awareness of dominance hierarchy.	3. Testosterone influences younger men to take higher risks	Can be counter cultural if that is the chosen reference	Also risk taking	Low status can lead to aggression if social mobility is unlikely Leadership, extremism		
Signs of disrespect, feelings of inferiority	4. Consumption, anticipation, joy (lacking status) Status Anxiety, shame, guilt, envy contempt					



Mate search/acquisition — ‘for passing on the genetic inheritance’ with a low risk partner

In ancestral times, men looked for signs of fertility (youth, healthy appearance) while women looked for stability and resources to help support them and their child. Despite massive cultural change, underlying gender differences persist.

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To be attractive to, and valued by real or imagined potential mates.	The range of emotions will be broad centering on various forms of attraction and rejection, and evaluation of mate value.	Men look for outward signs of health and fertility	Need to be noticed leads to going against the crowd	Men: increased competitiveness and risk taking – also status signs Derogate rivals status	Maslow’s safety needs (for women) as well as belongingness and love status for men	Increased self-esteem Successful / compatible mating
Sexy /romantic images/stories.		Women for signs of status and competence as a parent (long term)	Male overconfidence and over perception of signals as sexual			
Potential threats (competition for that mate)	Differences in: Short term mating Long term mating		Female commitment scepticism	Women: enhance appearance Derogate rivals appearance	Self-esteem for both	
Women will have greater parental investment so preferences for stability / status (prosocial type), or at least education, ambition and hard work.			Quick judgments of negative personality traits – risk management	Self-disclosure to deepen bonds	Some may develop cognitive, effectance or aesthetic needs if they perceive this as a route to a compatible mate.	
			Men become less loss averse	Both:, skills and personality traits considered to be attractive to prospective mate		
			Halo effect of attractiveness beneficial generally.	Courtship rituals, gifting, eating		



Mate retention — ‘because two parent care increases the chances of the child’s survival’ Includes the challenges of building and keeping long term relationships with significant others, even if there are no children involved.

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Cues that celebrate or threaten the main relationship - could be out of the context of the relationship e.g. an attractive person at work	Joy, satisfaction, intimacy, appreciation, admiration, respect, enjoyment vigilance, jealousy, anger, contempt	Intimate feelings are deeply linked with positive emotions of warmth, connectedness, and caring, and are so important to human needs that this is the most central reward of close relationships	‘Positive sentiment override’ supersedes negatives Interloper effect; women look out for emotional infidelity; men for sexual infidelity. Women more willing to sacrifice for children (certainty of relatedness) and work harder to keep their man.	Communal sharing: ‘ours’ rather than yours and mine Interdependence Share influence and power Relationship building activities Repair attempts after conflict Negative tactics from resource display to mate-guarding, manipulation, debasement, threats, etc.	<ul style="list-style-type: none"> • Commitment to the relationship • Respect • Good communication • Mutual support • Mutual friendship and warmth • Physical and emotional intimacy • Romance and a healthy sex life • Independent identities and interests as individuals 	<p>Enhance the quality of friendship, support, understanding, caring*</p> <p>Intimacy acceptance, acknowledgment, and understanding</p> <p>*Gottman and Silver The 7 Principles for Making Marriage work</p>
Relationship building situations						



Kin care — ‘your genes need to survive and reproduce’ Human children need care and development for a long time compared with other species.

Includes grand parenting, looking after relations, and businesses run with a family ethic

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Family /relations – priority given to those who share genetic inheritance	Positive emotions: Joy, trust, surprise, admiration, engagement, affection	Oxytocin is a neuromodulating hormone that helps create the bliss between mother and child.	Parenting styles: Authoritarian – Permissive – Uninvolved - Authoritative create happy, capable and successful (Maccoby, 1992).	Nurturing, providing, supporting	Autonomous motivation: the interest, challenge, and meaningfulness of parenting role	Physical, mental, moral and social development
Dependence	Negative: guilt, resentment, anxiety	Big eyes, small nose and oversize head (Cuteness) = ‘baby schema’ and activates reward centres in the brain.	Altruism helps the group survive	Protecting, setting boundaries, teaching, punishing	Controlled motivation: others’ expectations about how they should act as parents	Ongoing success of the family or business
Vulnerability	Help others to alleviate own distress		Reciprocity creates future obligation	Giving protection, food, shelter, knowledge etc. to related dependants / vulnerable people	Replaying your own parental ‘tapes’ – Transactional Analysis	Lack of resolution: physical, social and mental health problems
Kin care can extend to non-kin and businesses that are run as ‘family’.	Aversion to incest				Helping increases connectedness	