

bcw *Movatory*

Age of Values

JUNE 2023

Welcome to the Age of Values

On any given day in any part of the world, a politician may invoke ‘national values’ in defense of a policy. Elsewhere, a novelist may seek to reflect on the values of our age in his or her latest book. And someone buys a pair of trainers based on the brand’s values.

At the same time, a campaigner may use values as a rallying cry to advance a cause. In global corporate headquarters, leaders seek to define their values in a bid to attract the brightest and the best to work with them.

Perhaps we see values at their most potent on social media where they divide or unite, with people forming communities and forging alliances as they debate highly contentious issues – each side accusing the other of being on the wrong side of history.

Ours is a world that feels complex, volatile and uncertain for many. Ours is a time that is defined for many by pandemics, economic uncertainty and political instability.

So, is it any wonder that people hold tight to that which they can control, and stays constant – their own personal values?

This is the context within which businesses, brands, governments and organizations must communicate. If they are to succeed, they need a greater understanding of people’s values, and how they play out in a world which is constantly changing.

In the Age of Values, we must look at the world differently, understand people differently, and communicate differently.



Executive summary

Can values provide the key for communicators who are struggling to navigate complexity, anticipate change, and build relationships with audiences who are restless and distracted?

Our values are foundational; they shape our identities, determine what is important to us and impact how we engage with the world and those communicating with us.

They are more constant than attitudes, opinion, knowledge, or emotion; because once consolidated in adolescence, they tend to remain stable throughout our adult lives. They not only explain past behaviors but can also predict how we will behave in the future.

Crucially, in a world of change and uncertainty, our values are a ‘persistent truth.’ If we speak to people’s values, we can move them, whether that be to purchase, to advocate, to embark on a treatment pathway, or to vote ...

Values are also everywhere, permeating culture and politics as never before. Whether it’s brand values, corporate values, cultural values, or our own personal values, they dominate our conversations and define our arguments.

So, we wanted to understand more since we are in the “Age of Values”; who holds which values and where, and how they shape people’s interests, concerns, and behaviors.

We took as our starting point Professor Shalom H. Schwartz’s Theory of Basic Human Values that captures 11 universal values that serve as guiding principles for all human behavior. Then, we surveyed more than 36,000 respondents across 30 countries.

This summary shares some of our findings, starting with what we call the 3Gs: insights around how values vary with geography, across generations and the existence of values gaps. We reveal how we all belong to one of seven Values Archetypes™ before showing how values really do move people. Finally, we set out what this means for communicators.



But first up ...

Geography: The world according to values

It is easy to focus on that which divides us – indeed, polarization is a growing challenge, but we found that people around the world care not only about themselves but also about those around them.

They also seek safety, stability and harmony for their families and the societies they live in. The top three values globally are: Benevolence, Universalism Societal and Security.

Generations: It is time for a rethink

Generations remain the default for many businesses when defining and targeting their audiences, particularly when it comes to Gen Z. Alongside this is a narrative that often pits generations against each other,

be it around social attitudes or economic priorities. But when it comes to values, we found that the global trend continues to play out here: regardless of age, we are all primarily social, caring, and safety-seekers.

Gen Z stands out

Gen Z values Power, Achievement, Hedonism and Stimulation more than other generations. The greatest differences are found within generations; for example, the

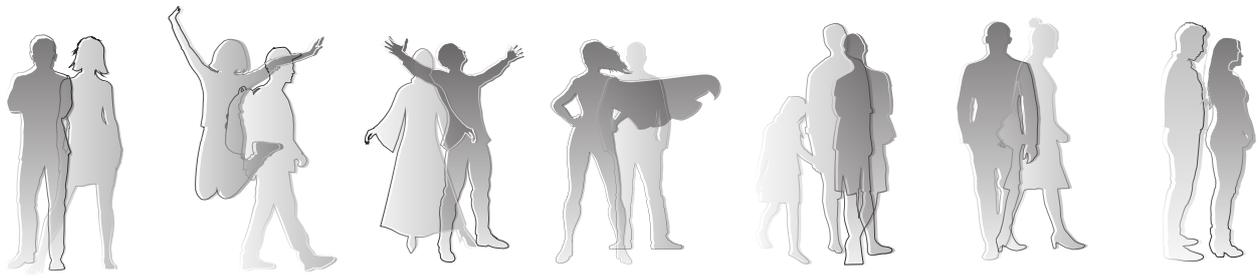
priority of values for Gen Z varies markedly by cultural region. It's clear that a more nuanced approach to understanding and engaging this cohort is needed.

Gaps: To know your values isn't to live them

Having values is one thing, to be able to live them is a whole different ballgame. We know that when we do, we are being our true selves and are happier. Yet, we cannot always shop or vote, according to our values. With limited time, energy, and opportunity, life gets in the way.

We found that across the world, people are struggling with a 'values-behavior gap' with only 46% of us able to live according to our values daily.

This is especially pronounced when it comes to governments and their citizens, with only 25% of us globally believing that our values are aligned with our governments and their programs. Perhaps because of this, people have great expectations of businesses when it comes to values-driven issues. The vast majority of people agree that businesses must act now to respect data and privacy online (82%), build a more diverse, inclusive and equal society (82%), provide support through the cost-of-living crisis (80%) and do more to combat climate change (81%).



SUCCESS SEEKER	ADVENTURER	VISIONARY	PROTECTOR	GOOD NEIGHBOR	TRADITIONALIST	CONFORMIST
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Meet the seven Values Archetypes™

Understanding that classic demographics can only take us so far, we set about segmenting people around the world according to their values. Using our research data and working with our expert partners, we have established that we all belong to one of seven **Values Archetypes™**.

Each has a distinct values profile, and therefore different life philosophies and communications imperatives for how to engage them.

The archetypes range from **'The Visionary'**, who values personal freedom and creativity, to **'The Protector'**, who prioritizes people and the planet, to **'The Traditionalist'**, who focuses on safety, stability, and harmony.

Our analysis busts the myth that Gen Z is one uniform group. Instead, it dominates the four other archetypes: **'The Success Seeker'**, who is driven by a desire for power and personal achievement; **'The Adventurer'**, someone who seeks stimulation and new experiences, **'The Good Neighbor'**, who places great importance on the welfare of friends, family, and the environment, and **'The Conformist'**, who wants to fit in and avoid confrontation.

The curious case of the electric vehicle

Finally, we show how values move people. We focus on climate change, one of the greatest challenges we face and find that values are more influential predictors of pro-environmental behaviors than demographics. But not always the values that you would expect.

In fact, when it comes to buying an electric vehicle, Stimulation,

Power and Achievement are stronger motivators than Universalism Nature. It seems that a desire for the new, for status, and to be perceived as successful, should not be overlooked by EV manufacturers. This shows the importance of understanding the different values in play in different contexts and the need to adopt a 'values-based engagement' approach to communications.

Values-based engagement

If brands, businesses and organizations root their communications in values, not only will they gain attention, drive engagement, and build trust, they will be able to move people efficiently and effectively, today and tomorrow.

1. DON'T BE DISTRACTED BY THE NOISE, FOCUS ON VALUES

By using values as a constant guide, you will show up consistently and authentically in all your communicators. They will be able to navigate the changing context and conversation, rather than being derailed by it.

2. USE VALUES AS THE FOUNDATION FOR AUDIENCE INSIGHT

Values give communicators the key to moving people. They explain our motivations, attitudes, and behaviors in any given situation. By rooting strategy in an understanding of audience values, communicators can better predict how people will think, feel and act.

3. DEFINE YOUR VALUES TO ALIGN THEM WITH OTHERS'

In communications, as in life, good relationships are built on shared values. Knowing and articulating corporate or brand values will enable communicators to target and connect meaningfully with the consumers, stakeholders, partners, and talent who share them. This collaboration will enable business and brands to better achieve their goals.

4. USE VALUES TO MANAGE COMPETING EXPECTATIONS

Businesses, brands, organizations, and governments constantly have to manage many competing demands, e.g., on climate change; diversity, equity, inclusion; and online safety. Aligning corporate values with audience values and expectations can be a critical filter to help determine priorities.

5. CLOSE THE VALUES: BEHAVIOR GAP TO LEAD

The business, brands, and organizations that make it possible for people to shop, live, vote, and work according to their values, will flourish. Those that look forward, anticipate, identify, and close the values-behavior gap for people, will lead.



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Our study

A multi-disciplinary collaboration with world-leading values researchers and academics

BCW Age of Values 2023 was produced by BCW's business accelerator for clients, the Movatory, in partnership with leaders in the field of values and cross-cultural research.

Our online survey sampled more than 36,000 respondents, across 30 markets¹.

We worked with Julie Lee, Founding Director of the Centre for Human and Cultural Values, University of Western Australia (UWA); and Hester van Herk, Professor of Cross-Cultural Marketing Research at VU, Amsterdam, to develop our methodology.

We used the Schwartz Theory of basic human values as our overarching framework. Validated across more than 100 studies in over 80 countries and widely accepted as the most reliable representation of human values.

We partnered with Savanta, the Intelligence Business, for research design, fieldwork and data analytics support.

Global reach. Scientific depth

30 million + data points

36,000 respondents

30 markets

11 basic human values

1 global framework

Argentina	Netherlands
Australia	Nigeria
Brazil	Philippines
Canada	Poland
Chile	Russia
China	Saudi Arabia
Egypt	Singapore
Finland	South Africa
France	South Korea
Germany*	Spain*
India	Sweden
Indonesia	Turkey
Italy*	UAE
Japan	UK*
Mexico	U.S.*

Values move people

They shape who we are, what we care about, and what we do

Values are our guiding principles in life. They determine what we care about, what we believe in, and how we behave.

Shared across countries, cultures, and generations, values unite us as a species, and the importance we accord them defines us as individuals.

Crucially, in a world of change and uncertainty, our values are a 'persistent truth'. Once consolidated in late adolescence, they tend to remain relatively stable throughout our adult lives. They not only explain past behaviors but can also predict how we will behave in the future.

“Recent values research shows that important values are more predictive of behavior than previously thought. They do this in a stable manner over time.

This has important implications for business. Values-based appeals are key to motivating people to act in given situations.”

JULIE LEE

FOUNDING DIRECTOR OF THE
CENTRE FOR HUMAN AND
CULTURAL VALUES, UWA

We all share eleven basic human values

Professor Shalom Schwartz's Theory of Basic Human Values captures 11 near-universal values which we share and can serve as guiding principles for human behavior.



The basic human values, and the behaviors they drive



Universalism Societal motivates us to promote understanding, appreciation, tolerance, and protection of all people in society; it emphasizes equality, justice, and protection for all.



Universalism Nature motivates us to promote the preservation of the natural environment; it emphasizes the protection of nature and animals.



Benevolence motivates us to promote the welfare of the people we are in frequent contact with; it emphasizes caring and dependability.



Conformity motivates us to promote restraint and compliance with social expectations to avoid upsetting others; it emphasizes adherence to rules, laws, and obligations.



Tradition motivates us to promote commitment and acceptance of customs and ideas that culture and religion provides; it emphasizes the maintenance of cultural, family, or religious traditions.



Security motivates us to promote personal and societal safety and stability; it emphasizes safety, harmony, and stability.



Power motivates us to promote social status and control over people and resources; it emphasizes social power, wealth, and authority.



Achievement motivates us to promote personal success according to social standards; it emphasizes ambition and the demonstration of competence.



Hedonism motivates us to promote personal pleasure and enjoyment; it emphasizes self-indulgence and sensuous gratification.



Stimulation motivates us to promote the pursuit of excitement and challenge in life; it emphasizes novelty, variety, and adventure.



Self-direction motivates us to promote independent thought and action; it emphasizes freedom, exploration, and creativity.

Understanding Schwartz's values wheel

The Theory of basic human values orders a set of values around a circle, where neighboring values share similar motivations and opposing values have conflicting motivations.

This means, for example, that someone who is motivated by Universalism (Societal or Nature) is also likely to be motivated by Benevolence and Self-direction.

The same person, however, will be less motivated by Power and Achievement, which are the values that are opposite Universalism in the wheel.

“Values explain the motivational bases of attitudes, emotional responses and behavior.”

PROFESSOR
SHALOM SCHWARTZ

These 11 values are organized into four higher-order groups that reflect different types of motivation directed either to the self or to others:

Self-enhancement: the pursuit of one's own interests and relative success and dominance over others

Self-transcendence: concern for the welfare and interests of others

Openness to change: independence of thought, action, and feelings and readiness for change

Conservation: self-restriction, preservation of the past, and resistance to change

Each of these groups, in turn, reflects the extent to which we are motivated by self-interest versus altruism, and openness to change versus preserving the status quo.

This complex system of congruence and conflict between values influences everything we think, feel, and do.



A young woman with her hair in a bun, wearing a bright orange ribbed sweater, stands in a city street. She is looking upwards and to the right. In her hands, she holds a smartphone and a pink cup with a red straw. The background is a blurred city street with buildings and hanging laundry.

the world according to values

Values by geography, generation, and gaps

Values are powerful, permeating culture and politics everywhere. But, to understand how they drive behavior, we needed first to establish who holds which values and where.

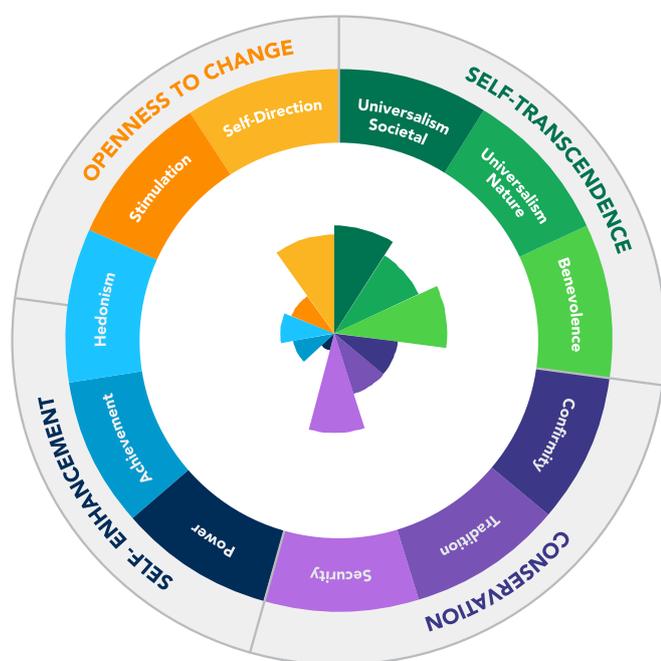
We also wanted to understand how aware people are of their values, what triggers them, how committed people are to act on them.

This is what we found ...

We aren't out for ourselves

People around the world are more caring, protective, and egalitarian than we may think

The world's values profile



At a time of economic uncertainty, when wars are being waged around the globe, the world order is being challenged and social media is transforming the way we communicate, it is easy to focus on that which divides us. Indeed, polarization is a growing challenge.

But we are social animals, hard-wired to cooperate with each other and avoid dispute or discord.

So, we found that people around the world care not just about preserving and protecting their own wellbeing but also the people around them. 57% of global respondents told us it is important to be loyal to their friends and almost the same proportion, 56% said they strongly believe that everyone should be treated equally and have access to the same opportunities.

What is a values profile?

A values profile shows the relative importance of each of the 11 basic human values to a person or population

The top three values globally are:



Benevolence: motivates us to promote the welfare of the people we are in frequent contact with; it emphasizes caring and dependability.



Universalism Societal: motivates us to promote understanding, appreciation, tolerance, and protection of all people in society; it emphasizes equality, justice, and protection for all.



Security motivates us to promote personal and societal safety and stability; it emphasizes safety, harmony, and stability.



The world's top values

Top three values (by volume) per country

Here we see the consistent prioritization of Benevolence, Universalism Societal and Security around the world.

Canada

-  Benevolence
-  Universalism (S)
-  Self-direction

U.S.

-  Benevolence
-  Universalism (S)
-  Self-direction

UK

-  Benevolence
-  Universalism (S)
-  Security

Sweden

-  Benevolence
-  Universalism (S)
-  Self-direction

Germany

-  Benevolence
-  Universalism (S)
-  Security

Mexico

-  Benevolence
-  Universalism (S)
-  Self-direction

Chile

-  Benevolence
-  Universalism (S)
-  Self-direction

Italy

-  Benevolence
-  Universalism (S)
-  Universalism (N)

Netherlands

-  Benevolence
-  Universalism (S)
-  Self-direction

Nigeria

-  Security
-  Self-direction
-  Universalism (S)

Brazil

-  Benevolence
-  Universalism (S)
-  Self-direction

Argentina

-  Self-direction
-  Benevolence
-  Universalism (S)

Spain

-  Benevolence
-  Universalism (S)
-  Universalism (N)

France

-  Benevolence
-  Universalism (S)
-  Universalism (N)

South Africa

-  Universalism (S)
-  Benevolence
-  Self-direction

“People share a common set of values that are at least somewhat important to almost everyone in society. These values help promote the smooth functioning of society, like benevolence values, emphasising caring for family and friends, and universalism values, emphasising appreciation and protection of all people in society, especially those who are vulnerable.

However, at the individual level, these may not be the most important values. People differ widely in the values they prioritize according to their unique characteristics and experiences.”

JULIE LEE

FOUNDING DIRECTOR OF THE CENTRE FOR HUMAN AND CULTURAL VALUES, UWA

Finland

-  Benevolence
-  Universalism (S)
-  Self-direction

Poland

-  Benevolence
-  Universalism (S)
-  Self-direction

Russia

-  Security
-  Self-Directon
-  Benevolence

China

-  Security
-  Universalism (S)
-  Benevolence

Japan

-  Universalism (S)
-  Security
-  Benevolence

Turkey

-  Universalism (N)
-  Universalism (S)
-  Security

Saudi Arabia

-  Security
-  Benevolence
-  Self-direction

India

-  Benevolence
-  Universalism (N)
-  Self-direction

South Korea

-  Security
-  Self-direction
-  Universalism (S)

Singapore

-  Security
-  Universalism (S)
-  Benevolence

Egypt

-  Security
-  Benevolence
-  Self-direction

UAE

-  Security
-  Benevolence
-  Universalism (S)

Indonesia

-  Security
-  Universalism (S)
-  Universalism (N)

Philippines

-  Security
-  Universalism (S)
-  Benevolence

Australia

-  Benevolence
-  Universalism (S)
-  Self-direction

Based on over-index versus global population

We see differences between countries when we look at the relative importance of values within a country, compared to the global population.

Canada

-  Universalism (S)
-  Tradition
-  Benevolence

U.S.

-  Tradition
-  Benevolence
-  Conformity

UK

-  Tradition
-  Benevolence
-  Conformity

Sweden

-  Hedonism
-  Benevolence
-  Universalism (S)

Germany

-  Hedonism
-  Benevolence
-  Security

Mexico

-  Hedonism
-  Stimulation
-  Self-direction

Chile

-  Hedonism
-  Stimulation
-  Universalism (N)

Italy

-  Universalism (N)
-  Tradition
-  Universalism (S)

Netherlands

-  Hedonism
-  Benevolence
-  Universalism (S)

Nigeria

-  Achievement
-  Stimulation
-  Conformity

Brazil

-  Tradition
-  Self-direction
-  Benevolence

Argentina

-  Hedonism
-  Self-direction
-  Stimulation

Spain

-  Universalism (N)
-  Benevolence
-  Universalism (S)

France

-  Hedonism
-  Tradition
-  Benevolence

South Africa

-  Tradition
-  Universalism (S)
-  Self-direction

Finland

-  Hedonism
-  Benevolence
-  Self-direction

Poland

-  Power
-  Achievement
-  Stimulation

Russia

-  Power
-  Security
-  Achievement

China

-  Power
-  Achievement
-  Hedonism

Japan

-  Power
-  Conformity
-  Hedonism

Turkey

-  Power
-  Achievement
-  Stimulation

Saudi Arabia

-  Power
-  Achievement
-  Hedonism

India

-  Power
-  Achievement
-  Stimulation

South Korea

-  Power
-  Achievement
-  Conformity

Singapore

-  Power
-  Achievement
-  Tradition

Egypt

-  Achievement
-  Power
-  Tradition

UAE

-  Power
-  Achievement
-  Stimulation

Indonesia

-  Conformity
-  Tradition
-  Stimulation

Philippines

-  Conformity
-  Power
-  Tradition

Australia

-  Tradition
-  Universalism (S)
-  Benevolence

The world makes more sense through the lens of values

We all look at the world in a certain way, grouping countries and people by continents and business regions. But Australia, for example, has more in common with the UK than it does Singapore when it comes to the values important to people there.

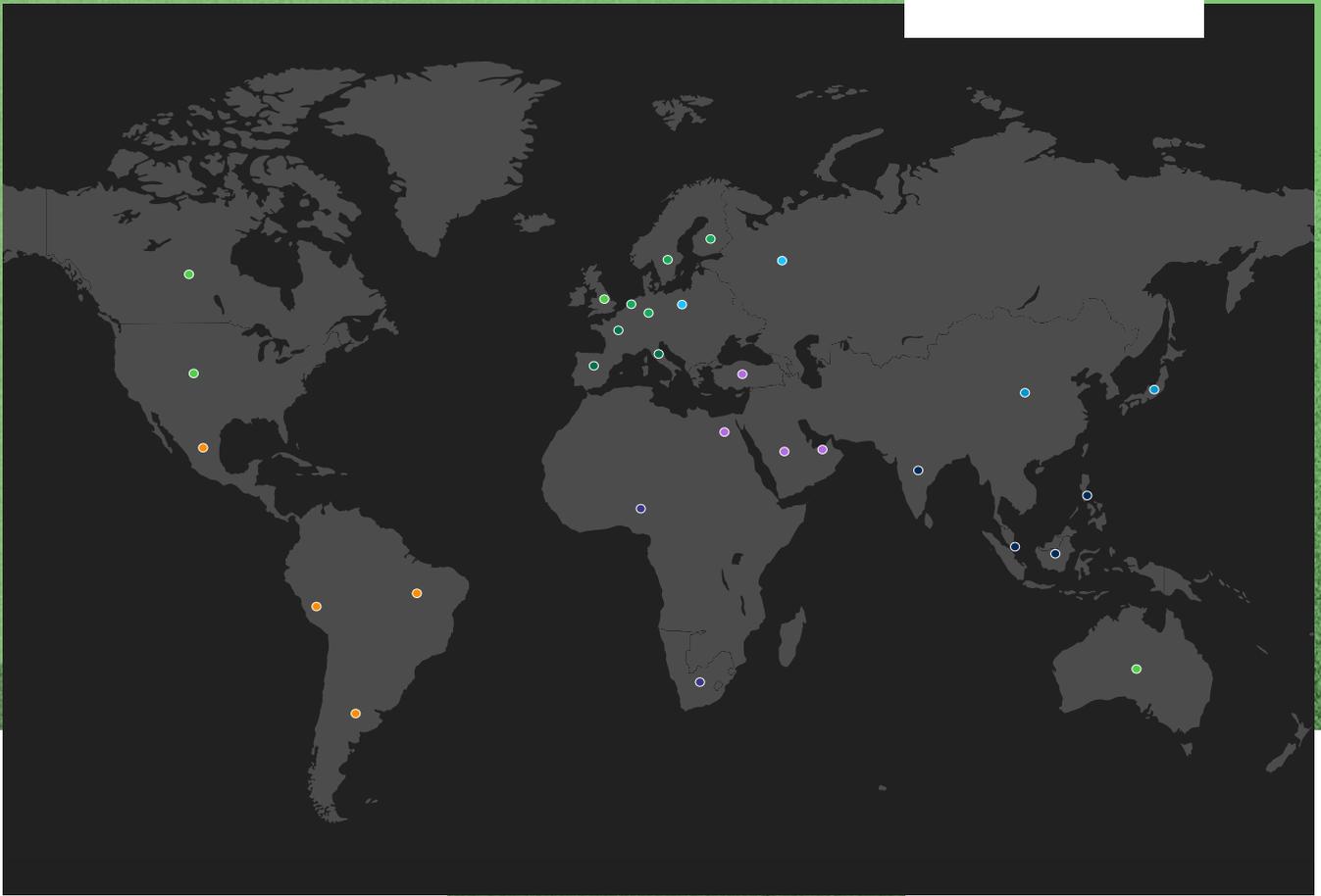
This means that if we are to understand the diversity and consistencies of values as they play out around the globe, we should map them against cultural regions, where countries are grouped according to heritage, philosophy and religion rather than just geography.

In the coming pages, you will see how values unite the countries within their cultural regions.

What is a cultural region?

Cultural regions are based on the idea that geography alone cannot predict human values and that other factors, such as culture, are key in understanding them.

The cultural regions defined in this report are informed by our values data and the analysis of Julie Lee, Professor and Director of Research and Research Training at the UWA. They are also used widely in research in personal and cross-cultural values.



English-Speaking

U.S.
UK
Australia
Canada

Eastern Europe

Russia
Poland

Middle East

Saudi Arabia
Turkey
Egypt
UAE

Northern Europe

Germany
Netherlands
Sweden
Finland

Confucian-Based

Japan
China
South Korea

Africa

Nigeria
South Africa

Southern Europe

France
Spain
Italy

South & Southeast Asia

Singapore
Indonesia
Philippines
India

Latin American

Brazil
Argentina
Mexico
Chile

Top values by cultural region

Highest indexing values per region

English-Speaking

-  Tradition
-  Conformity
-  Benevolence

“ We can see in **English-Speaking** society an increase in polarization. This is perhaps more uncomfortable for us, as we are largely driven by the desire to conform. This means we are keen to fit in, to along with the crowd and to not offend, where we don't mean to. This is an interesting tension in our culture.”

REBECCA GRANT
BCW UK

Northern Europe

-  Hedonism
-  Benevolence
-  Universalism Societal

“ **Northern Europe** scores highly on Hedonism because we've enjoyed several decades of economic growth and prosperity. This has enabled and encouraged us to seek and value pleasurable experiences – this is especially true for younger people!”

BARBARA MULDER,
BCW NETHERLANDS

Southern Europe

-  Hedonism
-  Stimulation
-  Universalism Nature

“ It's no surprise that **Southern Europe** places much importance on Universalism Nature. We've been feeling the consequences of climate change for a long time and perhaps to a greater extent than other regions in the West. It's hard not to become concerned about the environment when you experience a 43-degree summer in Madrid.”

MARÍA COBOS,
BCW SPAIN

Eastern Europe

-  Security
-  Self-direction
-  Benevolence

Confucian-Based

-  Power
-  Conformity
-  Hedonism

“ In **Confucian-Based** countries, it’s likely that Conformity is high and Self-direction is low because of how much these countries value collectivism and fitting in. Life can often be about juggling different types of conformity – to family, community, society, gender roles, or even the workplace.”

MAI AKAMATSU,
BCW JAPAN

South & Southeast Asia

-  Power
-  Achievement
-  Tradition

“The importance of Tradition here may seem counterintuitive at first. But **South & Southeast Asia** is in fact a fairly religious region, where people cherish tradition as a result.

This is in contrast to Confucian-Based, where, if we take China as an example, the so called “China dream” means people strongly value development and progress over tradition.”

JOE PENG,
BCW SINGAPORE

Middle East

-  Achievement
-  Tradition
-  Security

“ Achievement is more important in **Middle East** cultures than in many. Projecting personal success and achieving a certain standard and social status is very important to influence how others perceive you. Social pressures are quite high within communities, so even within neighborhoods where income levels aren’t very high, it’s not unusual to see people flaunting status symbols, like sports cars, designer clothing, etc.”

RAMI HALAWANI,
ASDA’A BCW

Africa

-  Stimulation
-  Achievement
-  Self-direction

“ Achievement is very important in Africa and definitely in Nigeria. It has to do with the fact that, traditionally, you earn a lot more regard and respect when you’re a high achiever. It is a thing of pride, either for an individual or a family to achieve certain levels – socially, educationally, financially, academically, and so on.”

YOMI BADEJO-OKUSANYA,
BCW NIGERIA

Latin America

-  Hedonism
-  Stimulation
-  Achievement

“ **Latin America** is a relatively new continent, in terms of how it has changed and developed since its colonization. Most families are formed from third-to-fourth generation immigrants, there is instability and social tension in the region, as well as high levels of inequality. This means that many people are focused on Achievement and being successful.”

ROSA VANZELLA,
BCW BRAZIL

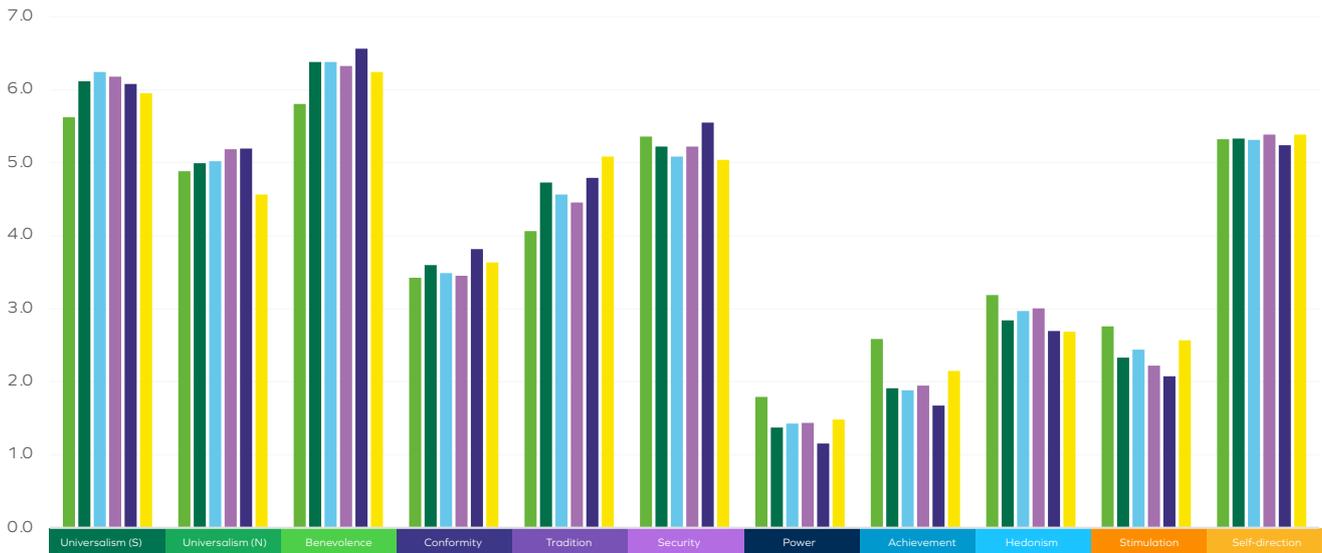
Regional values, country by country

We've shown that the world makes more sense when mapped by its values, and how values define cultural regions.

Here we go deeper into the data to show what the values of individual countries are, against each other, and the global mean.

English-Speaking countries

Here the U.S. stands out, placing relatively low importance on Universalism Societal, Universalism Nature, and Security and a higher importance on Achievement and Tradition. The UK is notably low on Achievement and Power.



Values across English-Speaking market

“In the **UK** we don’t like ambitious people. That’s not to say people aren’t ambitious; it’s just not socially acceptable to show it. It should be disguised by humility, humour, and self-deprecation. Even in politics. Think of Boris Johnson and that artfully ruffled hair.”

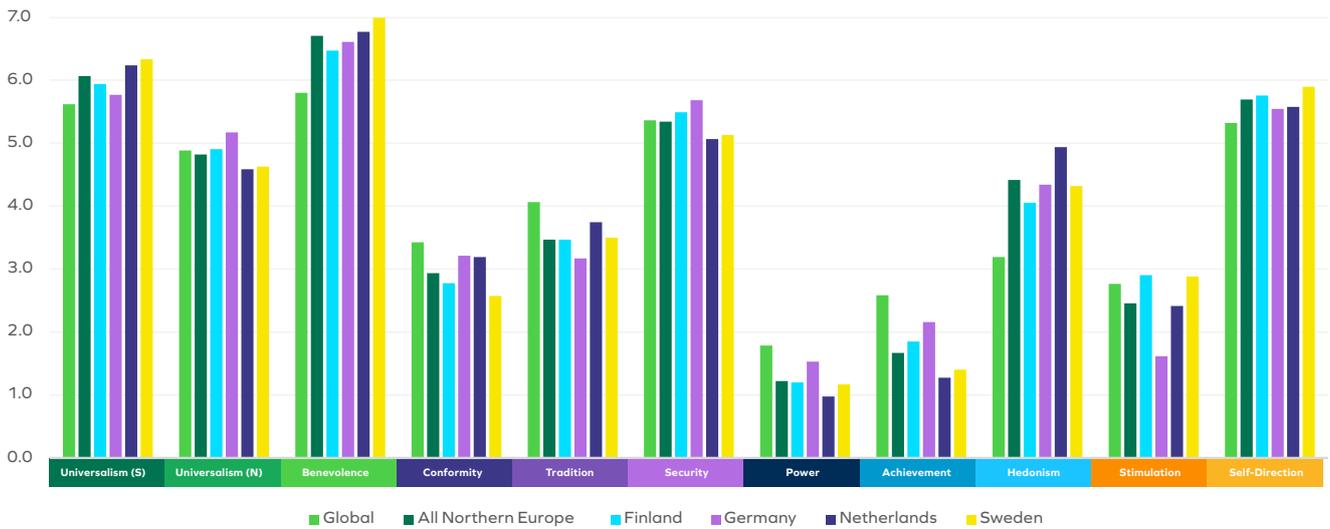
JT JOSEPH
BCW UK

“The **U.S.** is a relatively young country, with only two-plus centuries of history. So, we have formed our own traditions to establish our independence and honor our roots. Most of the holidays we celebrate in the U.S. are tied to our historical fight for independence or justice. For example, Thanksgiving, July 4th, Martin Luther King Day, or Juneteenth.”

NICK DRIVER
BCW NORTH AMERICA

Northern European countries

Hedonism over-indexes in this region more than any other and particularly in the Netherlands. Sweden stands out in the low importance attributed to Conformity. Germany places the greatest importance on Security and the lowest on Stimulation.

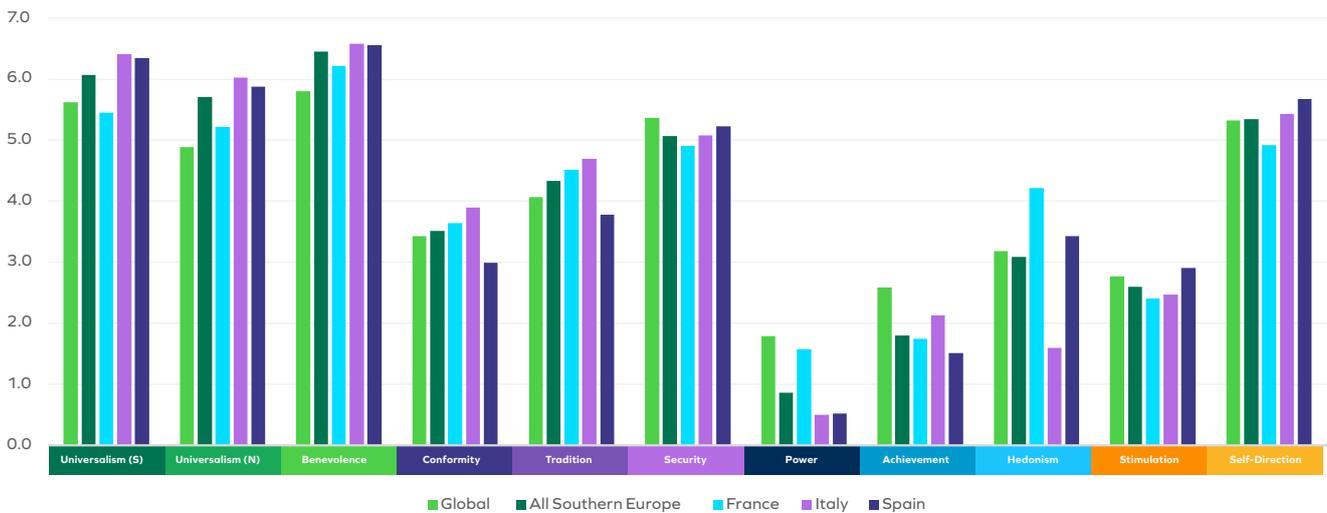


“Germany’s discipline and desire for social order stems from the devastating impact of World War II. The long shadow of this conflict explains why, even today, wanting to feel safe and secure is of such importance.”

IRENA VON BACH,
BCW GERMANY

Southern European countries

France places the highest importance on Hedonism in this region, in stark contrast to Italy. Spain meanwhile stands out for low Conformity and high Self-direction.

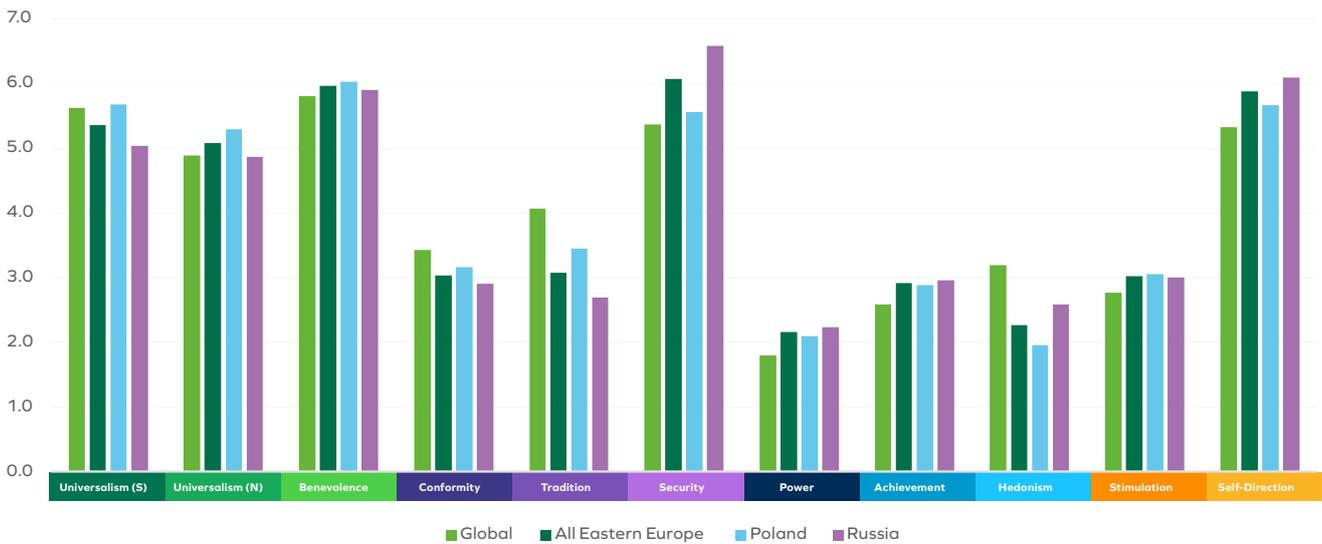


“The **French** really embrace the moments when they’re not working to enjoy life - having a glass of wine on the terrace, and good company. Pursuing new ways to have pleasurable experiences is a guiding light for us.”

PHILIPPINE BRUCHER,
BCW FRANCE

Eastern European countries

Russia indexes extremely high on both Security and Self-direction. This is an unusual profile. It is extremely rare to see values which are opposite each other on Schwartz's value wheel both rank highly.

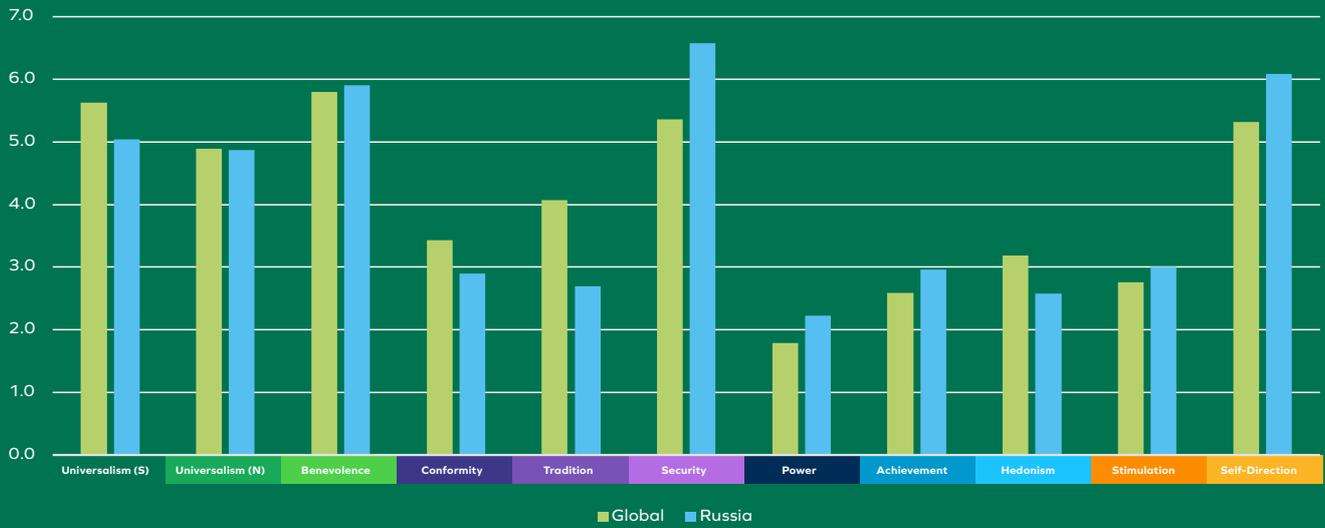


Security motivates us to promote personal and societal safety and stability; it emphasizes safety, harmony, and stability.

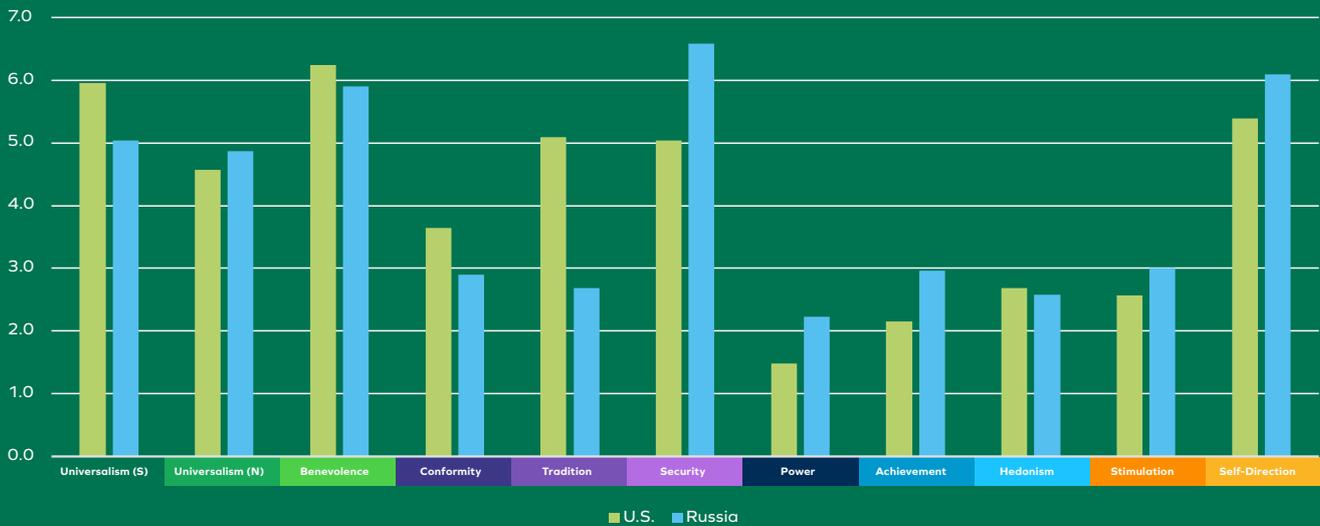


Self-direction motivates us to promote independent thought and action; it emphasizes freedom, exploration, and creativity.

Russia vs. Global

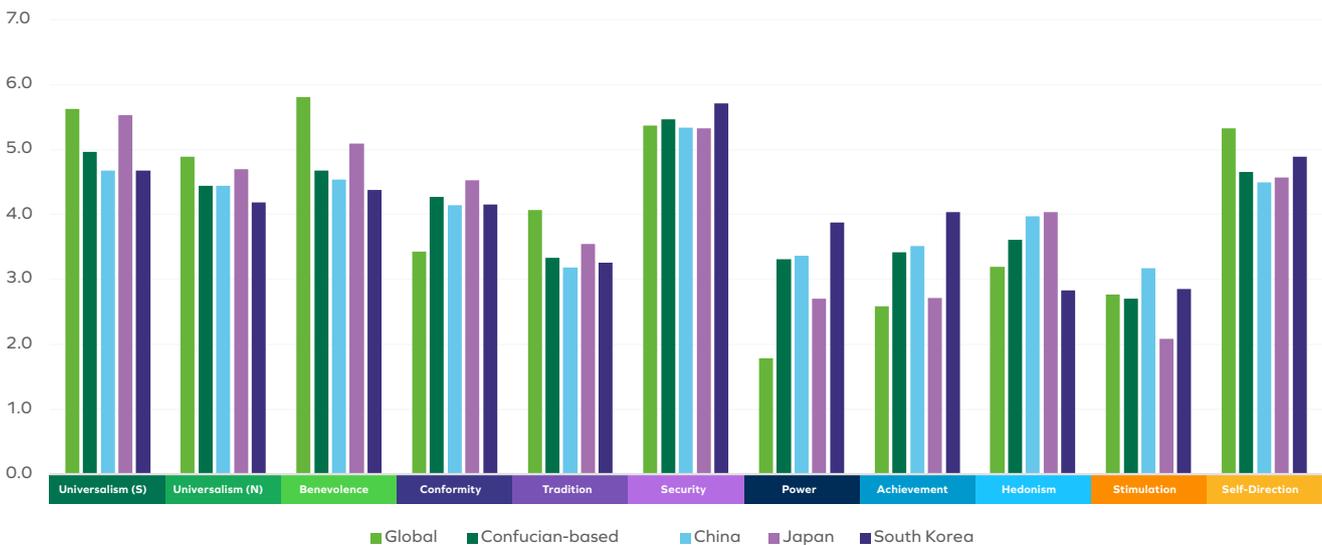


Russia vs. U.S.



Confucian-Based countries

Here we see some clear differences. Japan is an outlier, placing highest importance on Universalism Societal, Benevolence, and Conformity, and the lowest importance on Achievement, Stimulation, and Power. Notably China places relatively low importance on Tradition. South Korea is highest on Security.



“Achievement under-indexes in **Japan** because the generations currently making up most of the workforce have never experienced a good economy. Previously, if you worked hard, you would see the returns; now it seems that no matter what you do, it is very hard to get ahead. People nowadays don’t want more responsibility or authority because they won’t see the returns.”

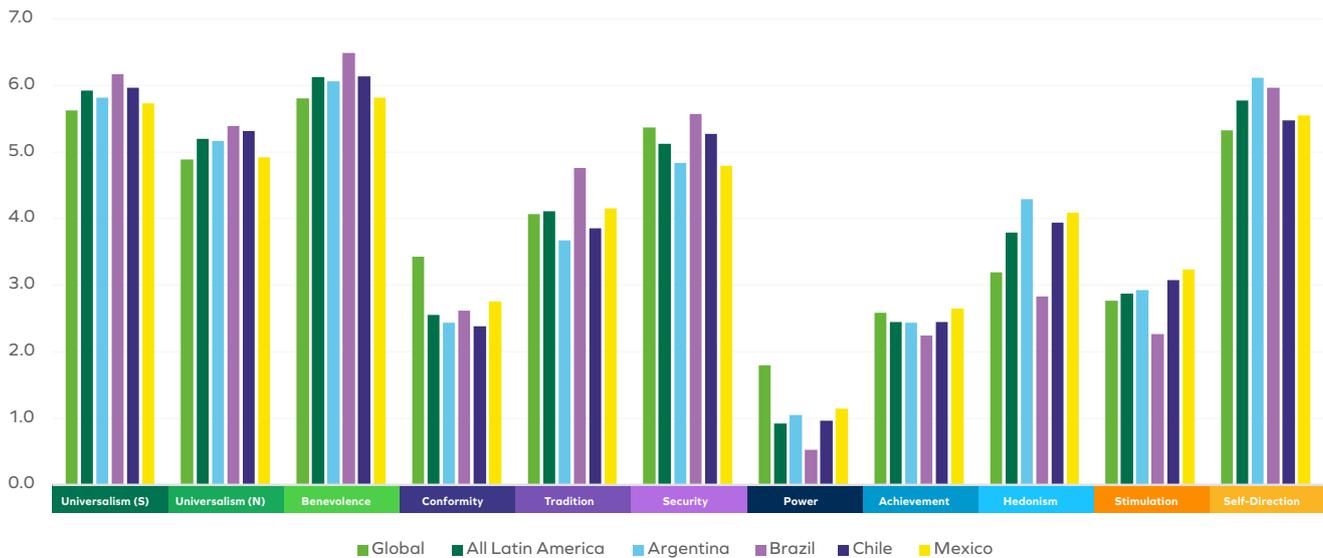
MAI AKAMATSU,
BCW JAPAN

“The ‘Chinese Dream’ is the latest expression of a way of thinking and collective philosophy that has defined **China** to a large extent for some time now – valuing development, growth, and the future over the traditions of the past. Tradition coming in relatively low for China is not a huge surprise.”

JOE PENG,
BCW SINGAPORE

Latin American countries

A consistent region, but with Brazil placing highest importance on Benevolence, Tradition, and Security, and lowest importance on Power, Achievement, Hedonism, and Stimulation. Argentina places relatively high importance on Hedonism and Self-direction.

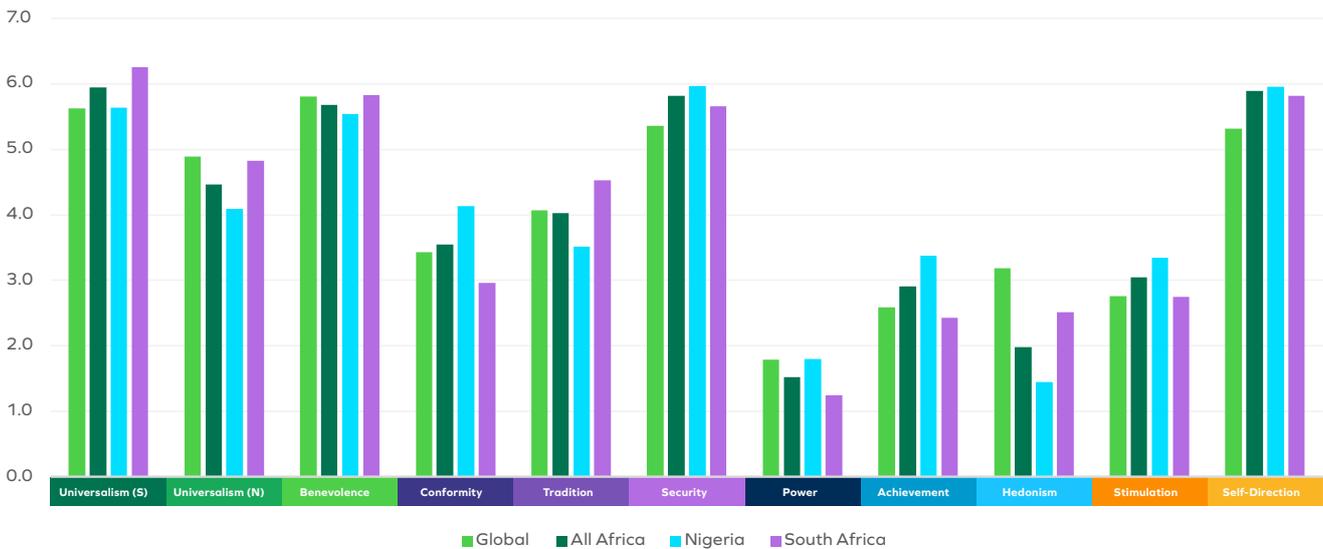


“Brazil is the biggest Catholic country in the world – for many Brazilians, their Catholic heritage and customs remain extremely important in their daily lives, so it follows that Tradition upticks here over the rest of Latin America.”

ROSA VANZELLA,
BCW BRAZIL

African countries

Here we see little difference between the two countries surveyed, but divergence between Nigeria and South Africa in terms of the importance placed on Conformity and Tradition. Of note, Security is a priority value for South Africa.



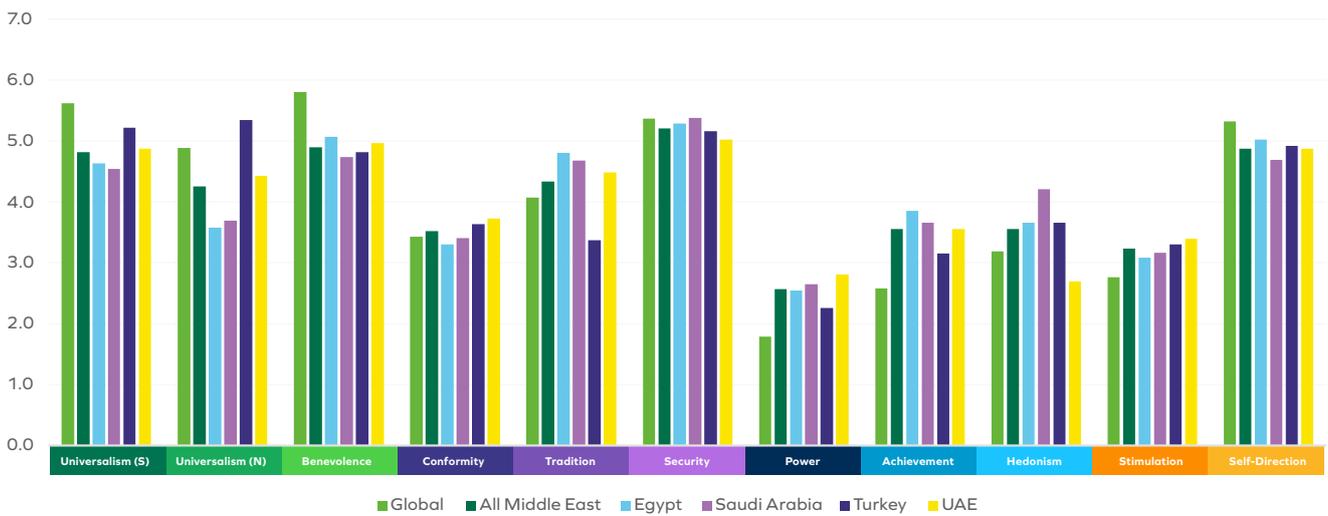
“In **Africa**, political and social instability and high levels of distrust in government – driven by considerable corruption – play a role in the importance people place on Security.

In South Africa specifically, the sense that if we’re not careful we might slip back into the social dynamics seen during Apartheid means people want to protect the stability of society and self.”

KARL HAECHLER,
BCW SOUTH AFRICA

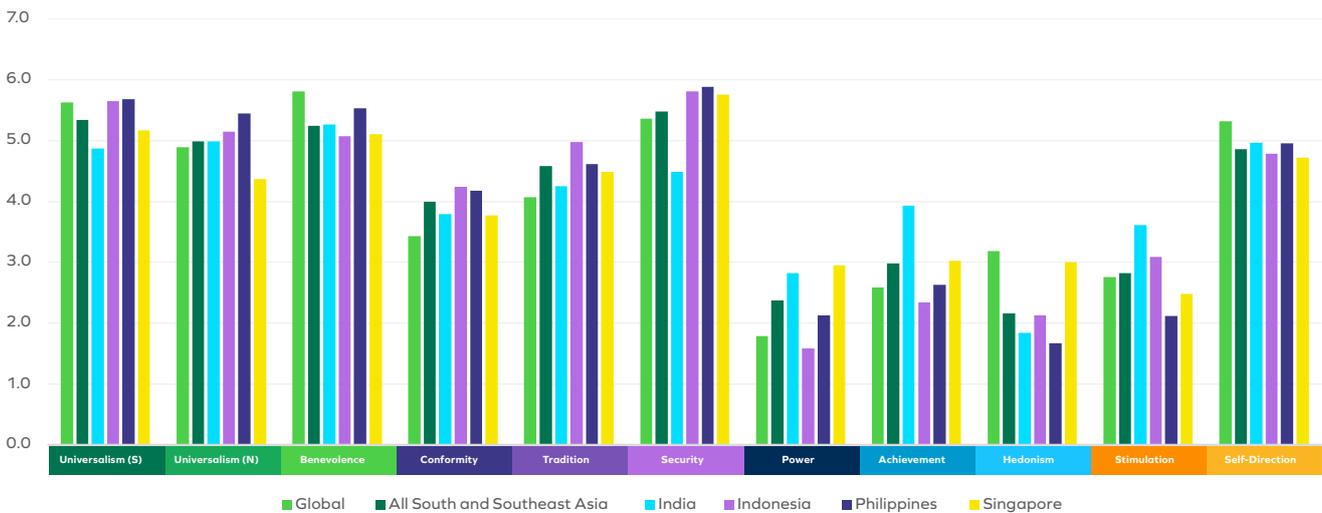
Middle Eastern countries

Turkey is the outlier here, placing relatively very high importance on Universalism Nature, which is low for the rest of the region. It also places lowest importance on Tradition, Power, and Achievement. The UAE is notable for the low value it places on Hedonism.



South & Southeast Asia

India values Stimulation and Achievement more than Tradition and Security. In contrast, Indonesia values Tradition over Power and Achievement. Singapore, meanwhile, is typical of the regional overall.



“The rise of India in the global economic order, combined with its extremely large youth population, means that ambition among Indians is high as they seek to seize opportunities ”

RAHUL SHARMA,
BCW INDIA



We need to rethink 'Generations'

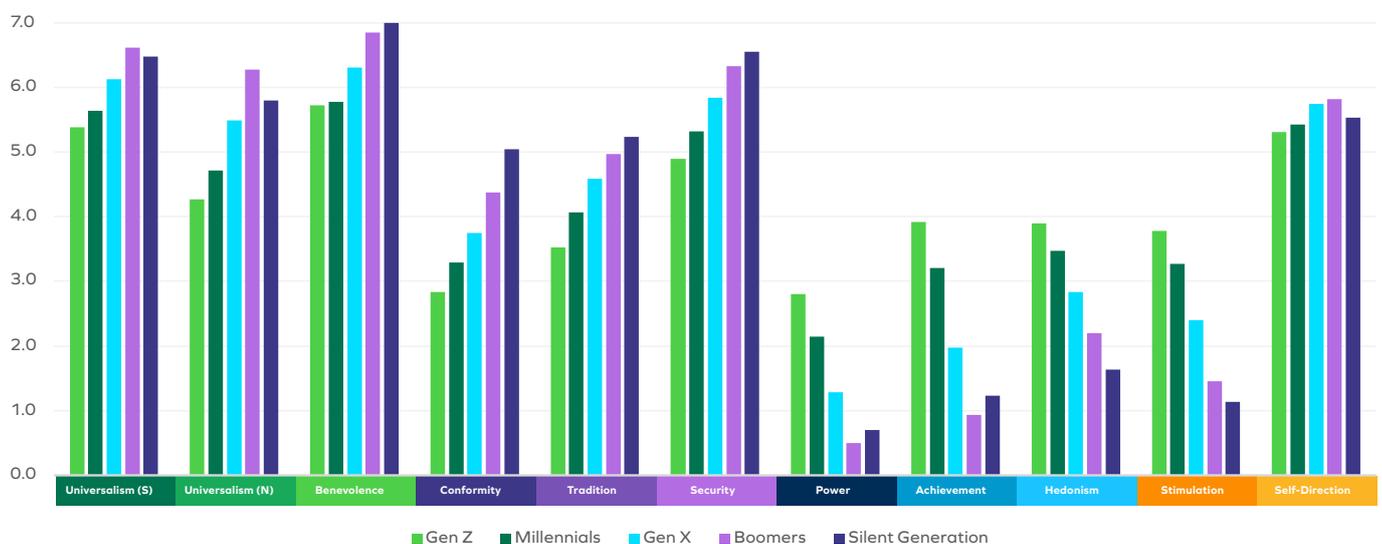
Values unite us across generations. The differences between them are smaller than the differences within them.

"Generations" have become the default way for businesses around the world to group their audiences.

The belief that people are best understood primarily by age still underpins many communications strategies.

Alongside this assumption is a narrative that often pits generations against each other, be it around social attitudes or economic priorities.

But here the global trend continues to play out: **regardless of age, we are all primarily social, caring, safety-seekers.**



However, Gen Z values Power, Achievement, Hedonism and Stimulation more than other generations

Young people have always been motivated by ambition, to progress and achieve personal success as well as social standing and power.

This may be more pronounced now as this generation faces not only economic and other challenges, but have lives dominated by social media – the ultimate platforms for demonstrating success, social standing and aspirational lifestyles.



Power motivates us to promote social status and control over people and resources; it emphasizes social power, wealth, and authority.



Achievement motivates us to promote personal success according to social standards; it emphasizes ambition and the demonstration of competence.



Hedonism motivates us to promote personal pleasure and enjoyment; it emphasizes self-indulgence and sensuous gratification.



Stimulation motivates us to promote the pursuit of excitement and challenge in life; it emphasizes novelty, variety, and adventure.



Minor differences between generations reflect the different eras in which they came of age

The increased focus on the self that we see in Gen Z is the continuation of a trend across a century, namely, a rise in individualist values (e.g., Self-direction) and fall in social values (e.g., Universalism Nature).

This trend reflects the different cultural contexts in which each generation came of age, driven by changing socio-economic, geopolitical and technological developments.

“Younger generations have grown up in highly digitized societies in which peers’ achievements are broadcast on social media, affording a window into the highlights of other people’s lives. As a result, it’s no wonder that younger generations focus so much on realising, and being seen to be realising, their highest potential.”

TAYLOR SAIA,
BCW UK

When values are formed?

Once formed and consolidated in young adulthood, a person’s values remain relatively constant but can shift to some degree with age.

The difference between generational values is reflective of the values that were socially and culturally dominant during each generation’s youth.



Some significant global events

The Great Depression

WW I aftermath, WW II

Atomic bombings

NATO formation



Some significant global events

Civil Rights Movement

War in Vietnam

Cold War

Decolonization of Africa

People's Republic of China formed

Sexual revolution

Silent Generation*

78+ years old (>1928 - 1945)

indexing higher on...

- 1. Conformity
- 2. Tradition
- 3. Security

How it shaped their values

Raised by parents who survived the Great Depression

Hard-working, disciplined, savers

Conformity, civic-minded, and patriotic



Baby Boomers

59 - 77 (1946 - 1964)

indexing higher on...

- 1. Universalism (N)
- 2. Conformity
- 3. Tradition

How it shaped their values

Raised in post-WWII, resource-volatile society

Economically minded, hard-working

Mission- and service-oriented



Gen X

43 - 58 (1965 - 1980)

indexing higher on...

- 1. Universalism (N)
- 2. Self-direction
- 3. Tradition

Some significant global events

Space exploration

Fall of the Berlin Wall

Creation of OPEC

Pinochet regime in Chile

Iranian revolution

How it shaped their values

Dual-income, households and rising divorce rates allowed families to be more self-reliant and flexible ("latchkey kids")

Challenging authority



Millennials

27 - 42 (1981-1996)

indexing higher on...

- 1. Power
- 2. Achievement
- 3. Stimulation

Some significant global events

Rise of the internet and social media

9/11, war in Iraq & Afghanistan

The Great Recession

G20 formed

Indian Ocean tsunami

How it shaped their values

Raised in tech-advancing society

Generally more self-focused and progressive



Gen Z

11 - 26 (1997 - 2012)

indexing higher on...

- 1. Power
- 2. Achievement
- 3. Stimulation

Some significant global events

Digital age and rise of the smartphone

Arab Spring

Major climate disasters

Rise of populism

Covid-19

How it shaped their values

Raised in digitized, individualistic society

Communicative, open, diverse and progressive



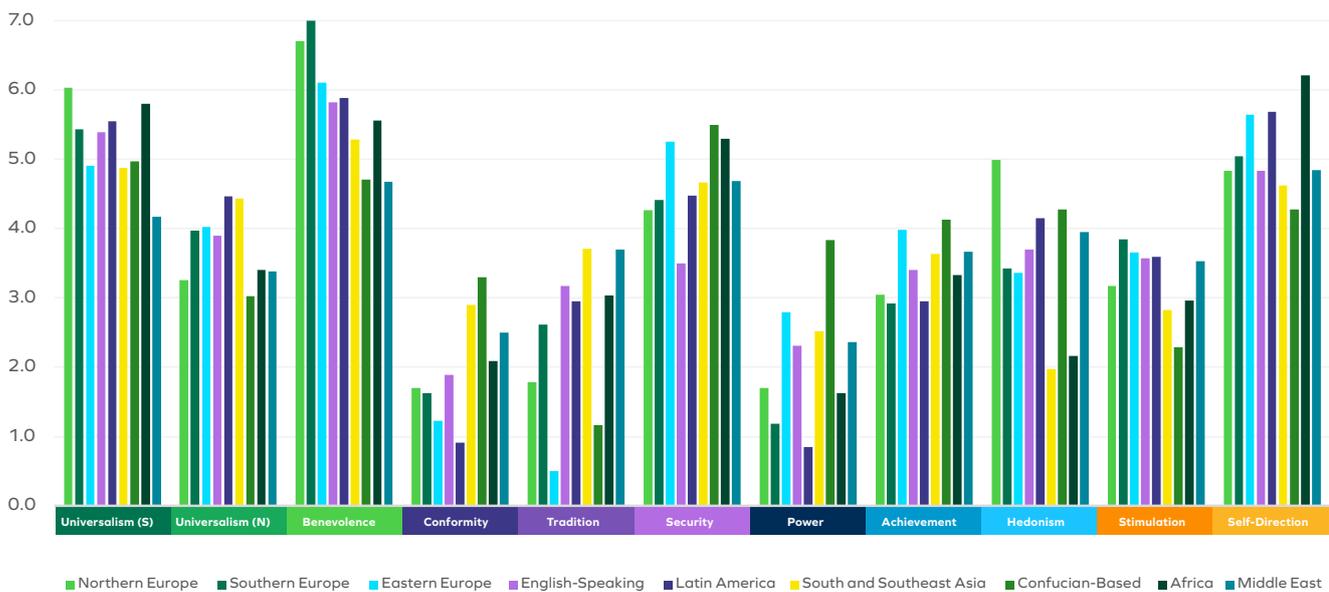
But no generation is homogenous

We see that generations are not homogenous when it comes to the fundamental drivers of motivations and attitudes – personal values.

Gen Z is huge, comprising approximately 2.4 billion people across the world.

Of course, they are not all going to have the same values profile.

Here we see the extent to which the values of a single generation - Gen Z - differ, reflecting their cultural region.



We've already noted the relative importance of Power, Achievement, Hedonism, and Stimulation of Gen Z relative to other generations. Here we see the prominence of those values rise and fall depending on where Gen Z live.

Gen Z living in Confucian-Based countries value Power and Achievement more than those in Latin America.

There is a striking contrast between Gen Z in Northern Europe and their counterparts in South & Southeast Asia when it comes to the importance of having a good time.

“Having come of age in a more globalized world than any generation before them, Gen Z may be more homogeneous than other cohorts – for instance, a Spanish Gen Z is likely to have more in common with a Singaporean Gen Z than, say, their Boomer counterparts.

However, this is not to say that all Gen Zs are the same - the culture they are born into still plays an important role in their development during their formative years, and there is still great cultural diversity around the world. It will be interesting to see whether there is further global cultural convergence in the future, and whether this will lead to even greater similarities within new generations.”

PABLO LOZANO,
BCW E&A

All about Gen Z

Born 1997 – 2012

30% of the global population

Largest generation on Earth

Purchasing power worth over \$100 billion globally

27% of the global workforce by 2025



To know your values isn't always to live them

Values, values everywhere but ...

We all talk a good game about values. Whether it's brand values, corporate values, cultural values or our own personal values, values dominate our conversations and define our arguments.

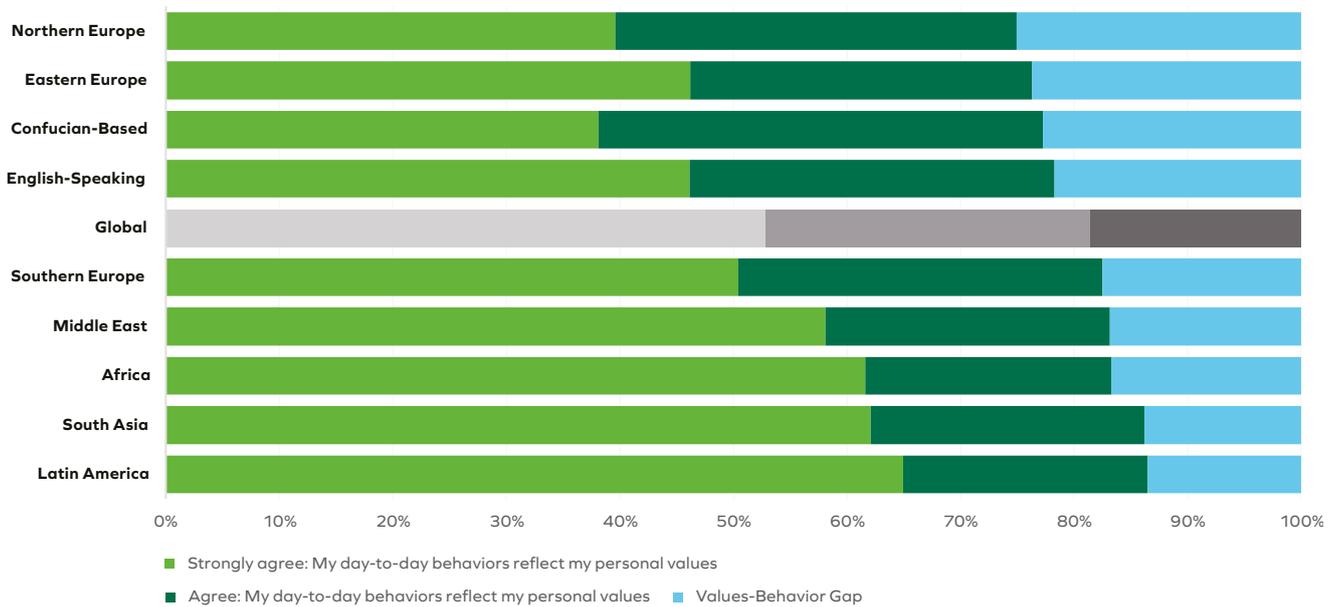
With good reason. We know that when we live according to our values, we are being true to ourselves, feel a greater sense of well-being and peace with the world around us. Science may give us the data on this, but common sense confirms it.

But we cannot always live, shop, and vote, according to our values. With limited time, energy and opportunity, life gets in the way and our decisions and behaviors are often driven by practicalities not principles.

"The wide values-behavior gap in Japan and South Korea is no surprise. Societal pressure and expectations are so high that many people play a "character" to fit in, not living by their true values but rather conforming to what society expects of them."

MAI AKAMATSU,
BCW JAPAN

Values-behavior gap



Understanding values awareness

We all have personal values, but we vary in the extent to which we are aware of them. This impacts the strength with which values impact our daily thinking and decisions. We call this concept 'values salience.'

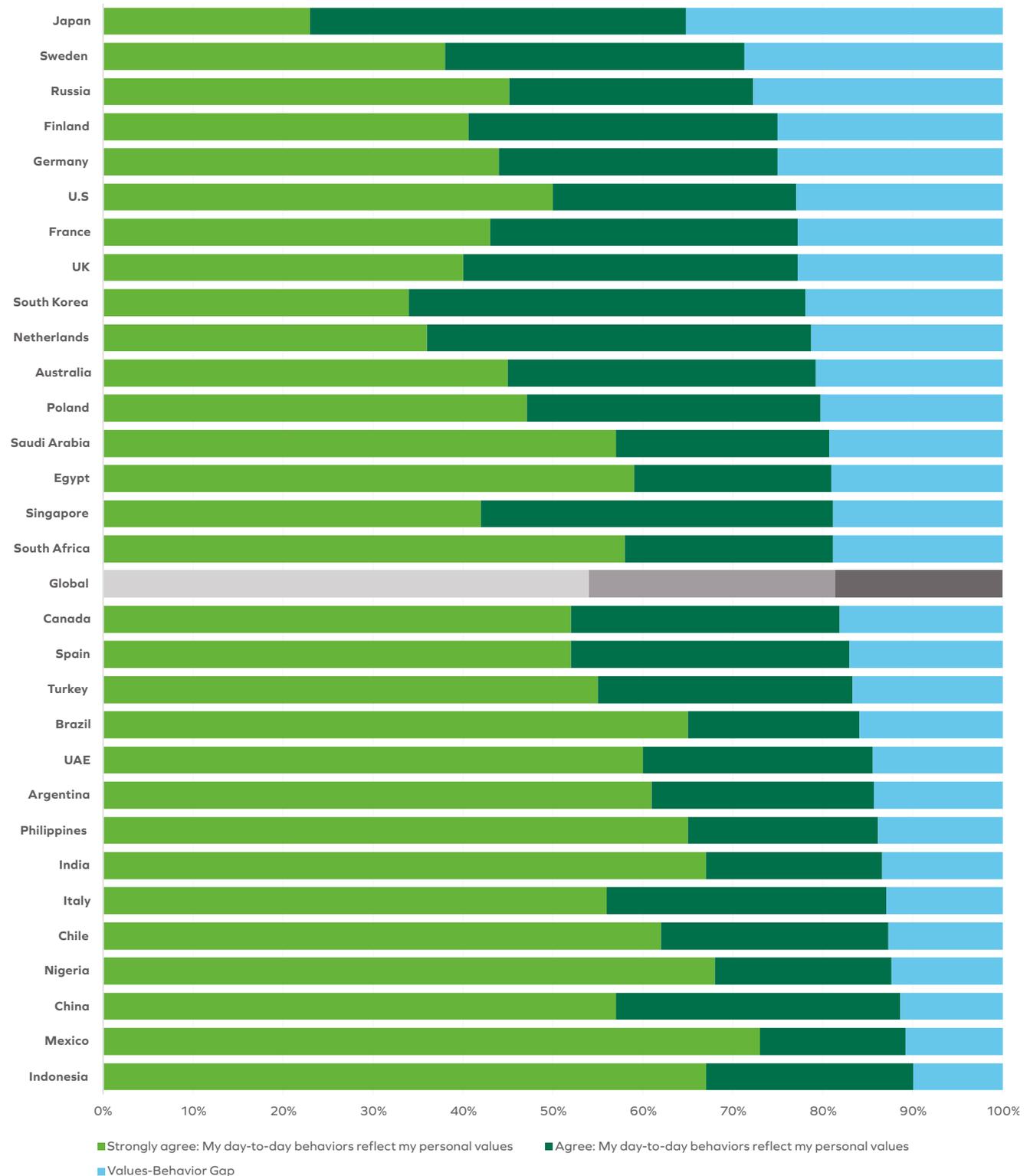
People with higher Values Salience are more likely to feel that their personal values are driving their day-to-day behaviors. This means that increasing Values Salience is likely to be an enabler to living a more values-based life and achieving the associated well-being benefits.

Big gaps, small gaps

Where individuals responded strongly agree, we can infer that they live their lives aligned with their values. In the below table blue indicates where users do not live aligned to their values, which results in a values-behavior

gap - the larger the blue bar, the higher the more likely that individuals are finding it harder to live according to their values

Values-behavior gap across countries

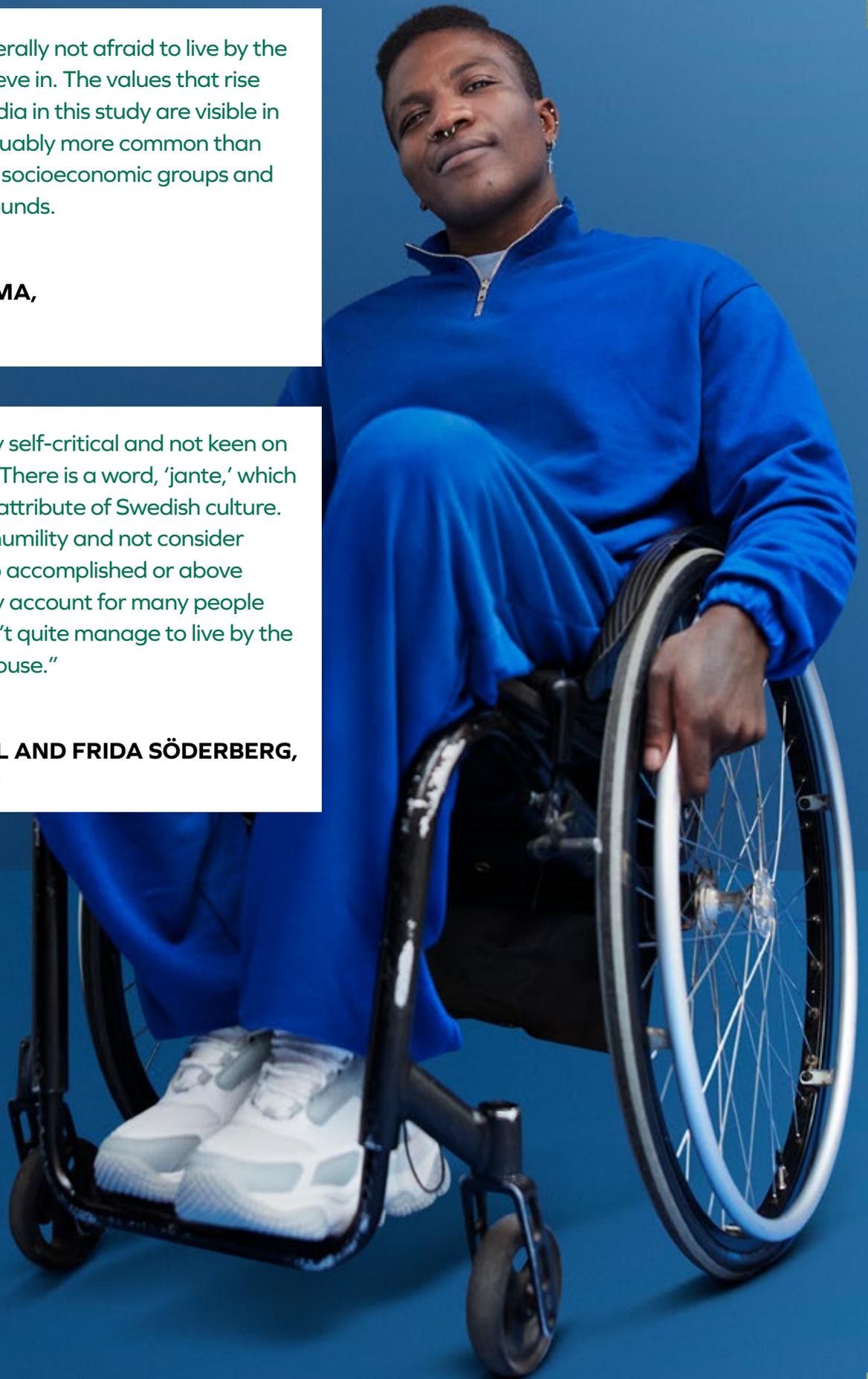


“Indians are generally not afraid to live by the values they believe in. The values that rise to the top for India in this study are visible in society, and arguably more common than different across socioeconomic groups and diverse backgrounds.

RAHUL SHARMA,
BCW INDIA

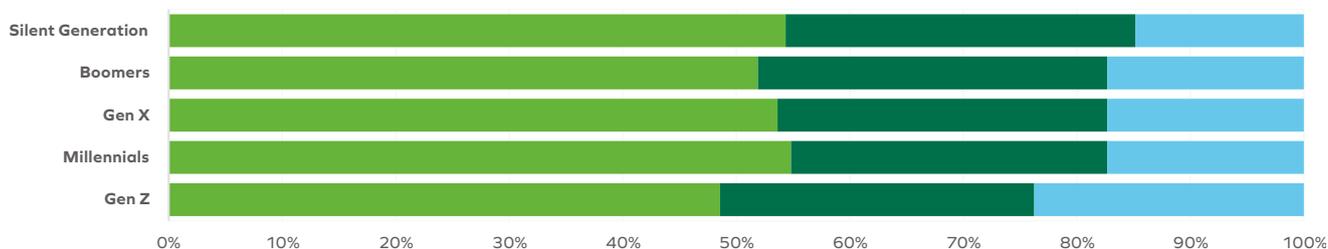
“Swedes are very self-critical and not keen on self-promotion. There is a word, ‘jante,’ which explains a core attribute of Swedish culture. We must have humility and not consider ourselves as too accomplished or above others. This may account for many people saying they don’t quite manage to live by the values they espouse.”

AXEL BRINGEL AND FRIDA SÖDERBERG,
BCW SWEDEN

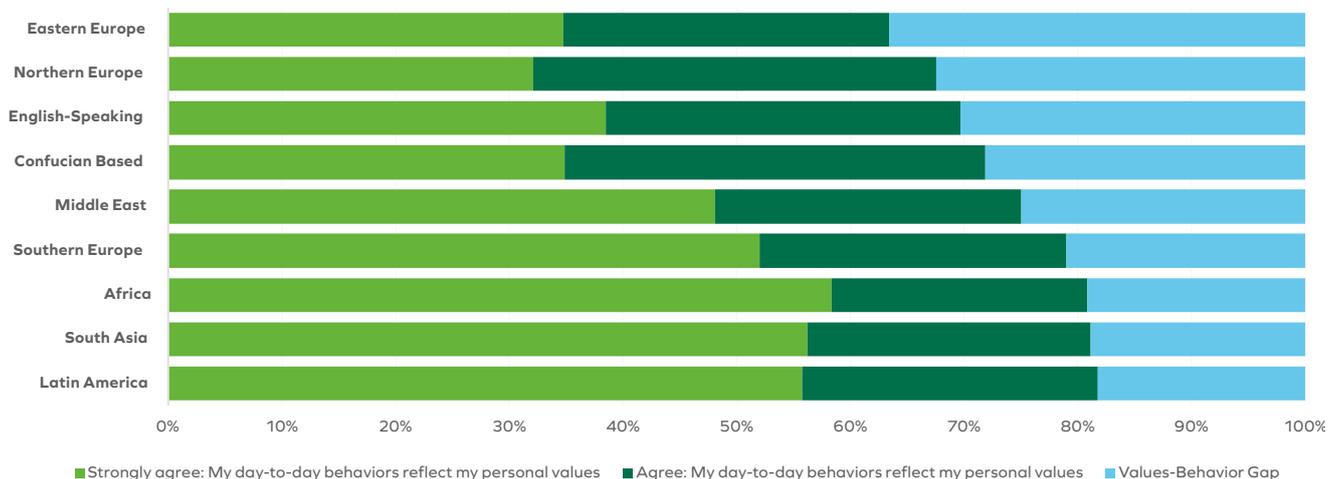


Millennials ahead in closing the gap, just

Values-behavior gap across generations



Values-behavior gap for Gen Z across cultural regions



When it comes to generations, the values-behavior gap is marginally higher for Gen Z, with Millennials more able than others to live according to their values.

But looking within Gen Z we see that it rises and falls, depending on geography. Only one in seven individuals live according to their values in Eastern Europe but one out of three in Africa are able to.

Gen Z, 'I can live according to my values'*

1 in 2
Globally

1 in 3
Africa

1 in 3
Eastern Europe



Governments and citizens are out of step

Only a quarter of people globally believe that their government shares their values

From demonstrations in France against pension reform to anti-war rallies in Russia and the uprisings in Iran, tension between governments and their citizens is evident around the world.

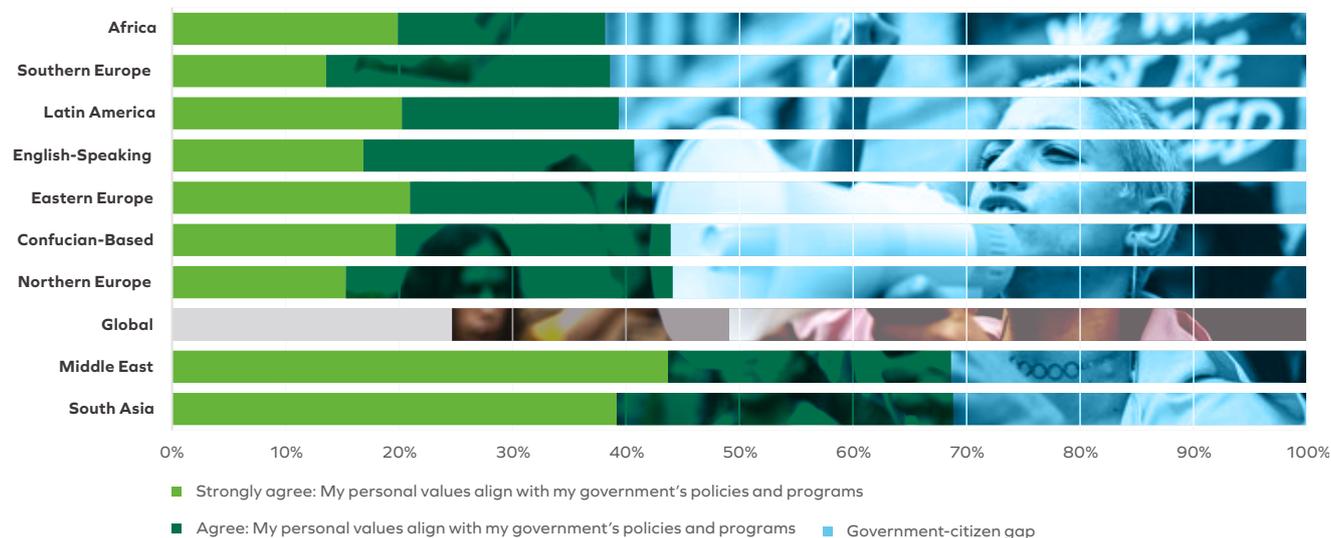
Only one in four of the global population agrees that their personal values align with their own government's policies and programs.

The disconnect is most pronounced in Southern (14%) and Northern Europe (15%) and English-Speaking countries (17%).

This suggests an emerging and deep legitimacy crisis for governments unless politicians convince their citizens that they share their values.

The proportion is markedly higher in South & Southeast Asia (39%) and the Middle East (44%) where, significantly, the research found issues of Security were paramount.

Government-citizen values gap across cultural regions



1 in 4

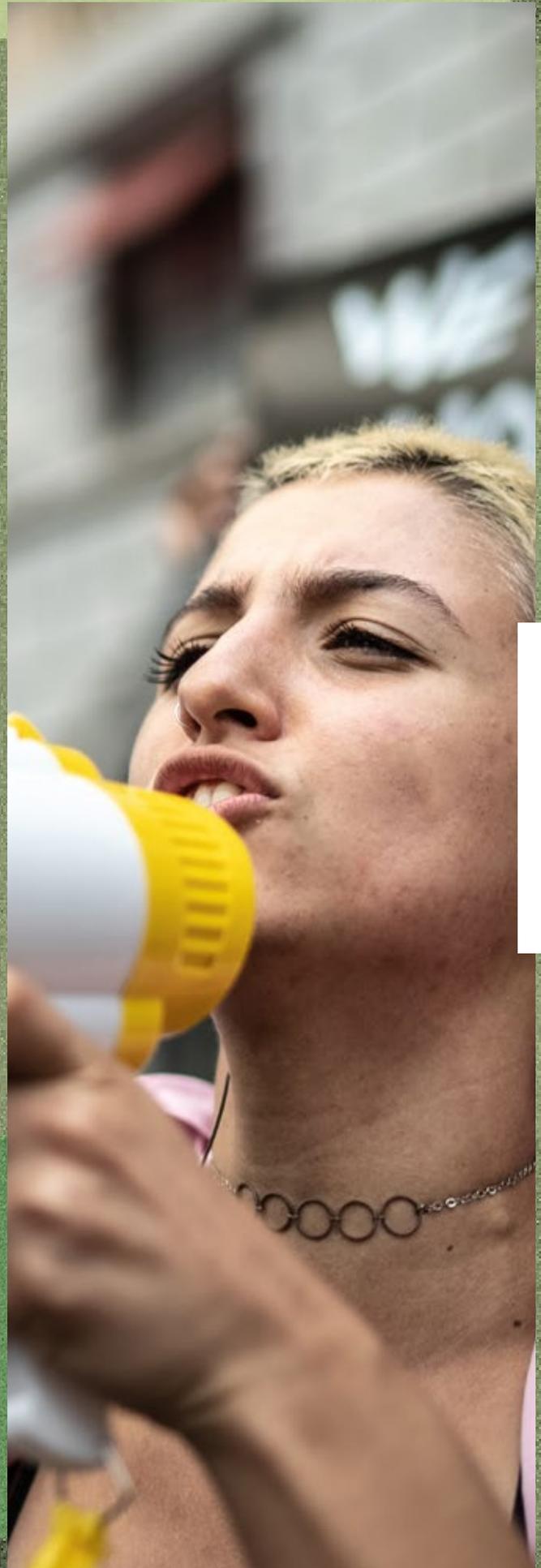
strongly agrees their personal values align with their government's policies and programs

1 in 6

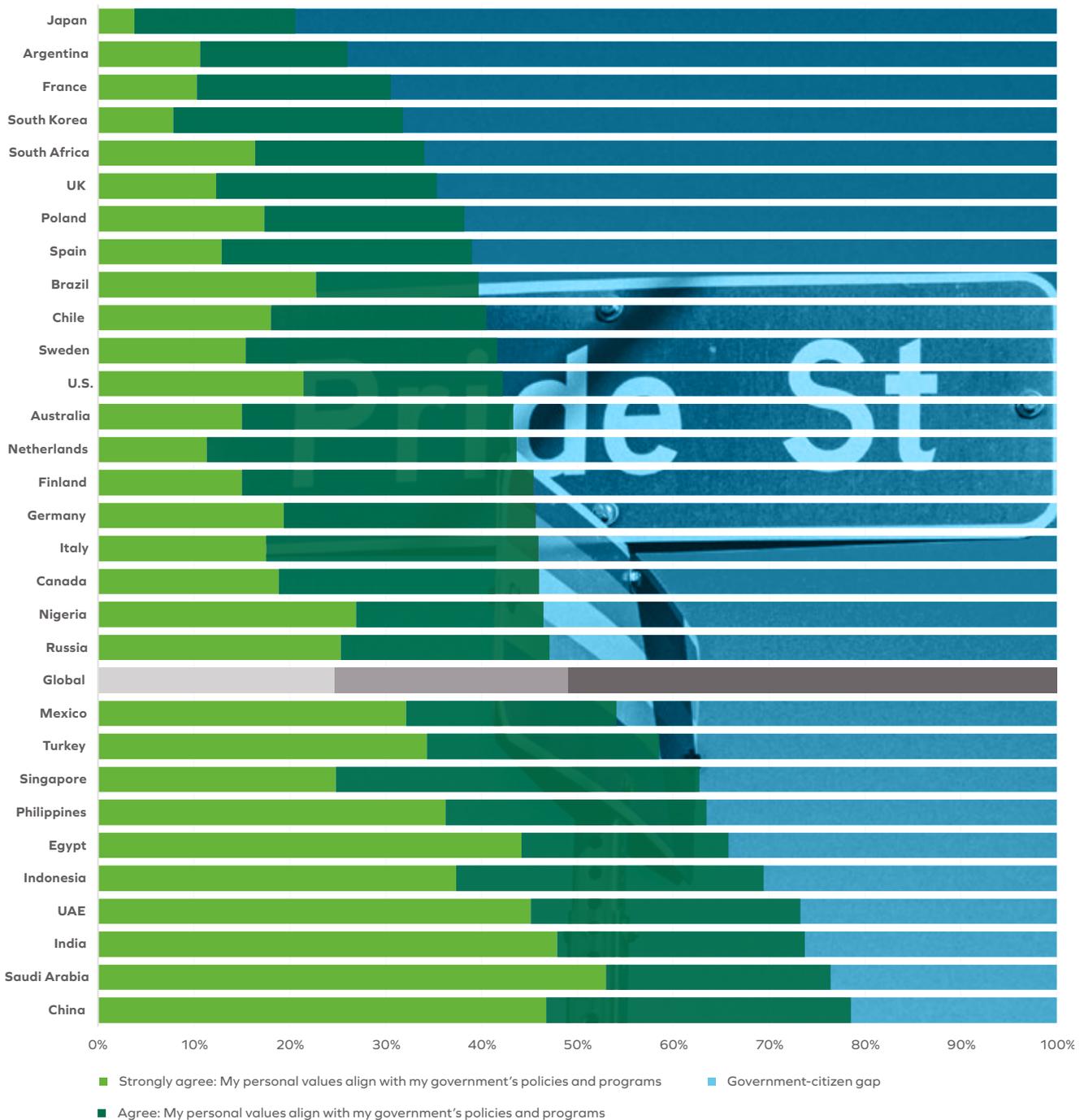
in English-Speaking countries

> 2 in 5

in the Middle East



Gap between government values and citizen values



“The values void between governments and citizens could help explain the rise of high-profile forms of civil protest in the West. Groups like Extinction Rebellion and Black Lives Matter may be attracting support from people who feel that their governments don’t care about issues which run core to their personal values and are mobilizing to make their voices heard.”

JAMIE DOWARD
BCW UK

Pride St



My personal values align with my governments policy and programmes. Strongly Agree.

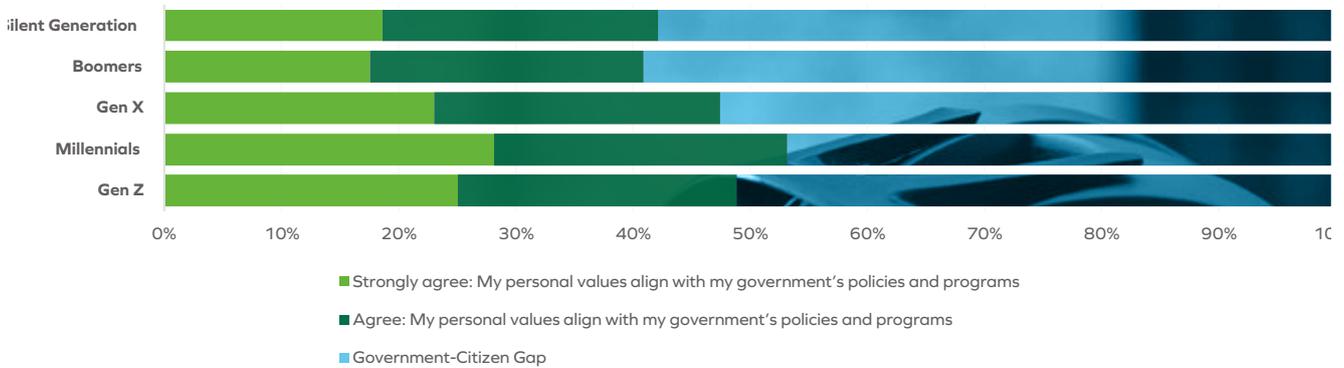
Gen Z shares more values with government than Boomers do

The values gap between governments and their citizens changes across generations and perhaps not in ways that many might imagine.

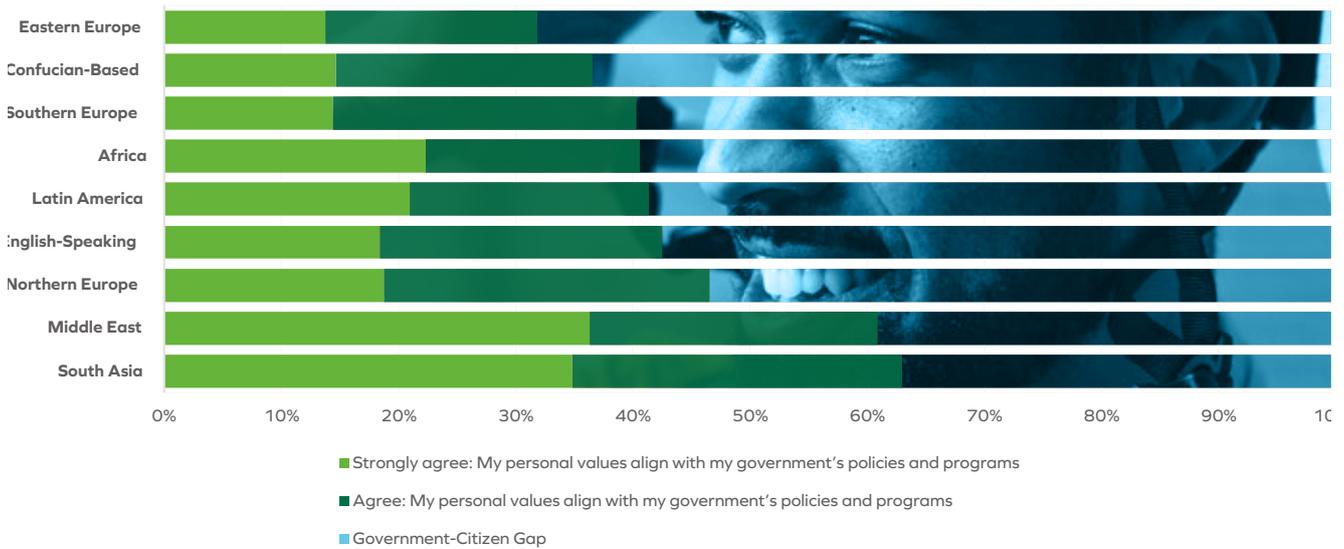
In line with the global population, only 25% of Gen Z agree that their values are aligned with those of their governments.

This rises to 28% among Millennials before dropping down to just 18% among Boomers who appear to be deeply disillusioned with their politicians. It seems the older we get, the more cynical we become about those in power.

Government-citizen values gap



Government-citizen values gap for Gen Z across cultural regions





People want more from business

People globally have consistently high expectations of brands and businesses when it comes to values-driven issues

When it comes to moving people, it's all well and good to know peoples' values, but we need to understand how these drive expectations and behaviors in relation to some of the biggest shared challenges of the day: be that online data privacy, climate change, ensuring a diverse, equal, and inclusive society (DEI) or the cost-of-living crisis.

All of these have the potential to challenge our ability to live according to our most prominent values (Benevolence, Universalism Societal, and Security).

87%

agree that businesses must show them that they respect their **data privacy** and **online safety**

81%

agree that businesses must act now to combat **climate change**

82%

agree that businesses should help build a more **diverse, inclusive, and equal society**

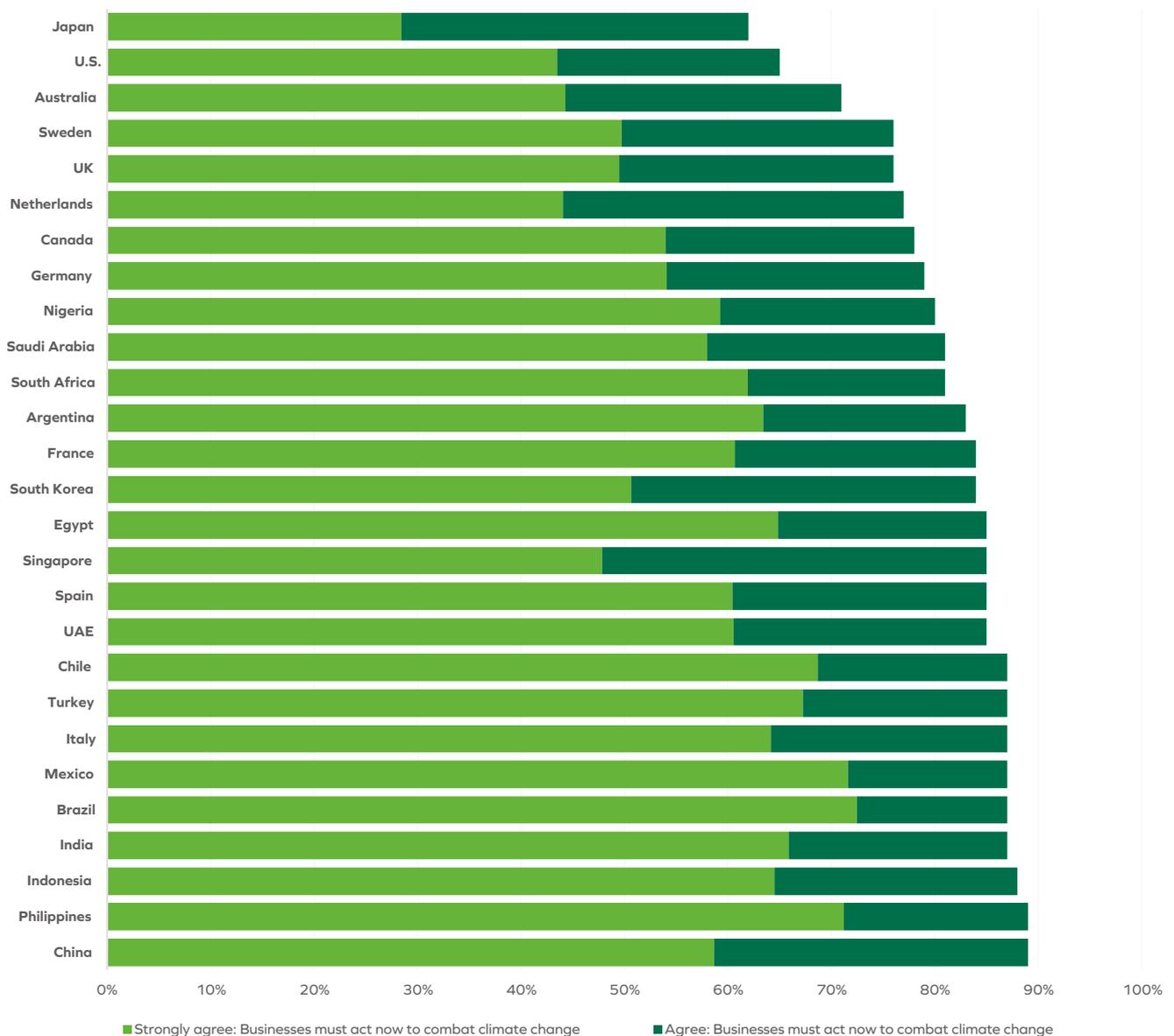
80%

agree that businesses should support customers through the **'cost-of-living' crisis**

Purpose is not dead

The rise of purpose-related and ESG corporate strategies could be in part explained by the perception that governments haven't moved fast enough to address these issues, frustrating people and presenting an opportunity for businesses and brands to close the values-behavior gap.

“Businesses must act now to combat climate change”



A new way to understand people

Classic demographics can only take us so far in understanding people's values and how they impact their priorities, concerns and behaviors.

So, we set about segmenting people around the world according to their values. Using our research data, and working with our expert partners, we have established that we all belong to one of seven Values Archetypes™.

These archetypes transcend, to a large degree, geography, generation, and gender. They are directly accessible and applicable to communications challenges for governments, businesses, and brands.

A global first

Each archetype is defined by its values, and the degree to which they play out in life priorities, expectations of governments, businesses, and brands, and their behaviors. Our understanding of each archetype means that we can target, engage, and move them more effectively.

"The classic approach to marketing segmentation based on standard demographics is limited in today's complex world. Current psychographics - focusing on beliefs, attitudes, and motivations - just scrape the surface. This analysis provides a deep and stable understanding of the core desires that come into play in the daily lives of each archetype."

LISA STORY

GLOBAL CHIEF STRATEGY OFFICER,
THE MOVATORY

"This study carefully considered how personal values can be effectively measured and analyzed to uncover how value priorities combine within individuals. The seven archetypes offer a cohesive view of the value systems that occur within different groups of people, leading to new discoveries and insights."

JULIE LEE

FOUNDING DIRECTOR OF THE CENTRE FOR
HUMAN AND CULTURAL VALUES, UWA

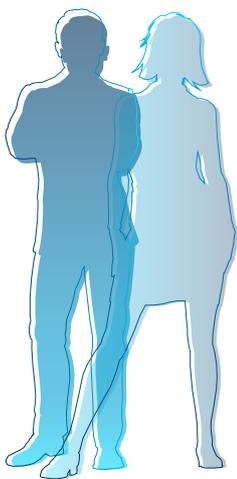




values
archetypes™

Meet the seven

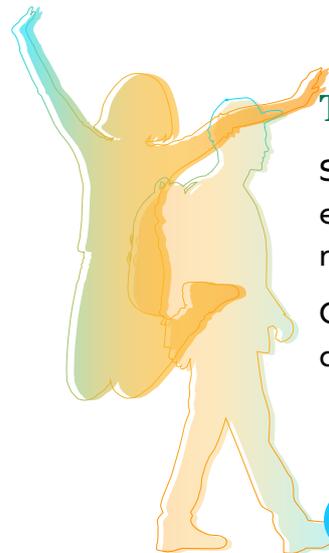
Whilst we all share some values, these archetypes are defined by their distinguishing values.



The Success Seeker

Is driven by a desire for personal achievement, power and social status.

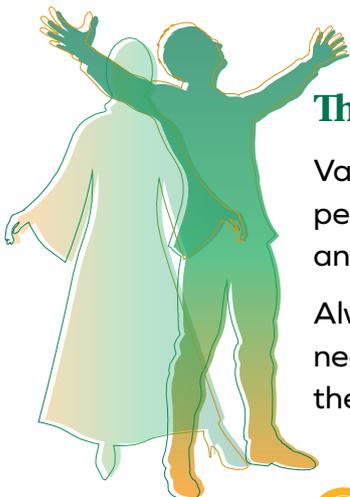
Pursues pleasure as well as fun and indulgent experiences.



The Adventurer

Seeks stimulating experiences and embraces novelty and exploration.

Open-minded, independent and creative.



The Visionary

Values independence, personal freedom and creativity.

Always considers the needs of others and the environment.



The Protector

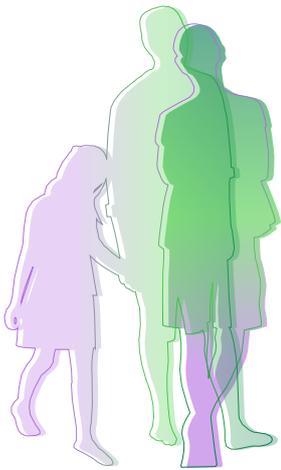
Prioritizes people and planet and strives for equality for all.

Feels a duty to act on issues important to them and appreciates other people's perspectives.



Meet the seven

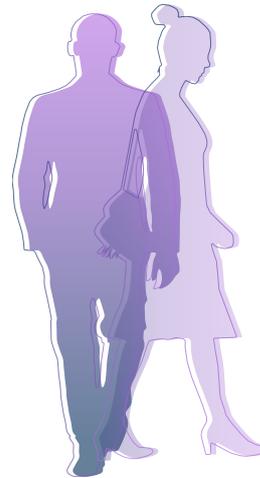
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The Good Neighbor

Places great importance on the welfare of family, friends and community.

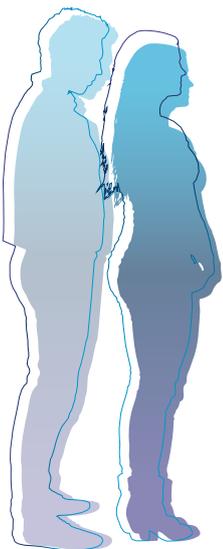
Seeks harmony and treats people with loyalty and respect.



The Traditionalist

Values stability, safety and harmony.

Wants to protect the status quo for the benefit of self, family and society.



The Conformist

The Conformist wants to fit in above all else.

Follows the rules and avoids confrontation in order to succeed.



The Success Seeker

Is driven by a desire for personal achievement, power and social status. Pursues pleasure as well as fun and indulgent experiences.



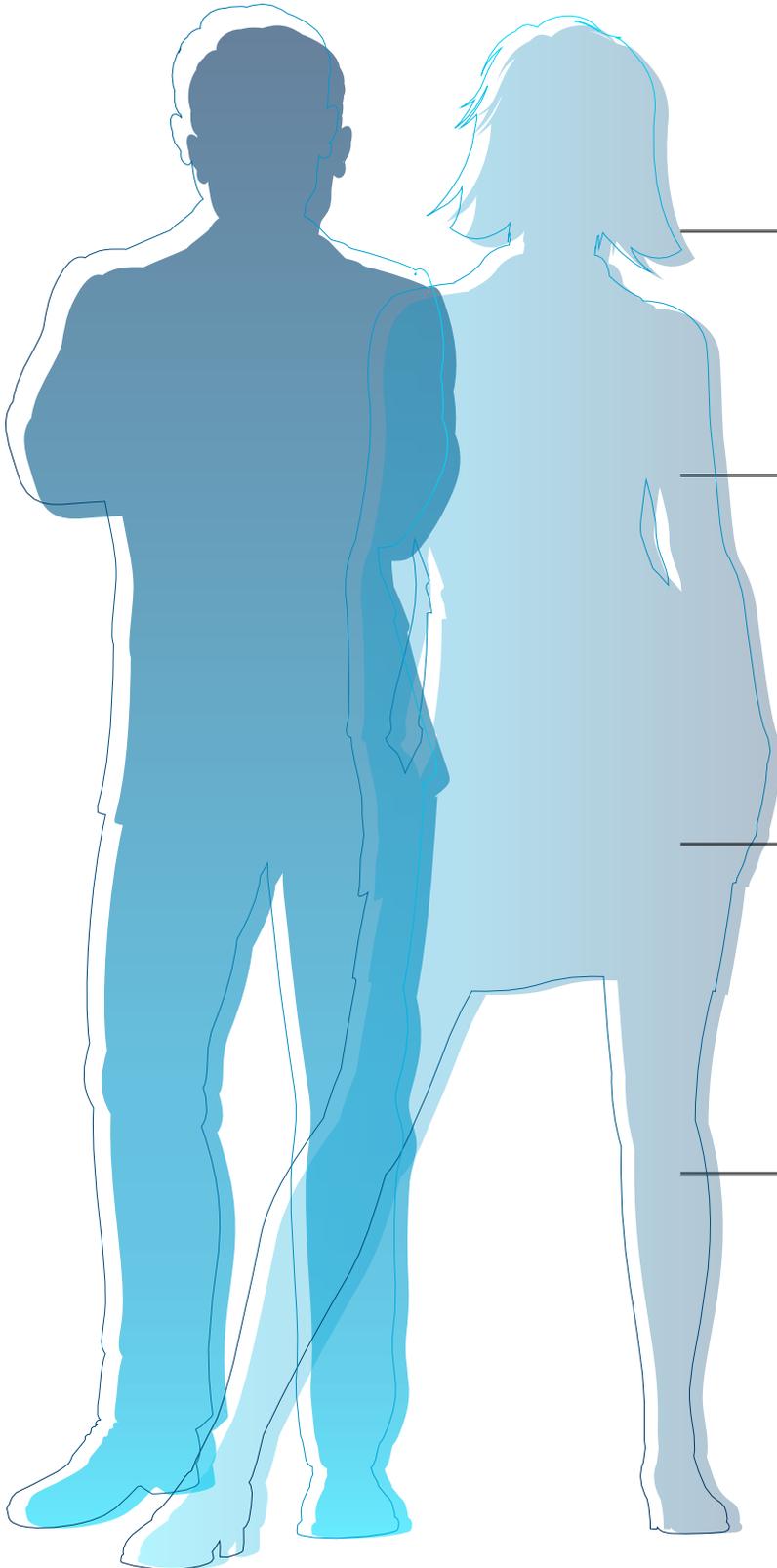
-  Achievement
-  Power
-  Hedonism

Philosophy

'I strive to get ahead, but it's important to have fun, too.'

Comms imperative

'Tell me what's in it for me.'



LIFE PRIORITIES

- Financial security
- Physical health
- Education and learning

VALUES SALIENCE

- 51% have a clear understanding of their values
- 48% say their day-to-day behavior reflects their personal values

ATTITUDES & EXPECTATIONS

- Lowest understanding of its values, but most likely to buy purpose-led brands, likely because income allows.
- Expects business to respect their privacy and data.
- Least likely to expect business to act on climate change, DEI, or the cost-of-living crisis.

OVER-INDEX

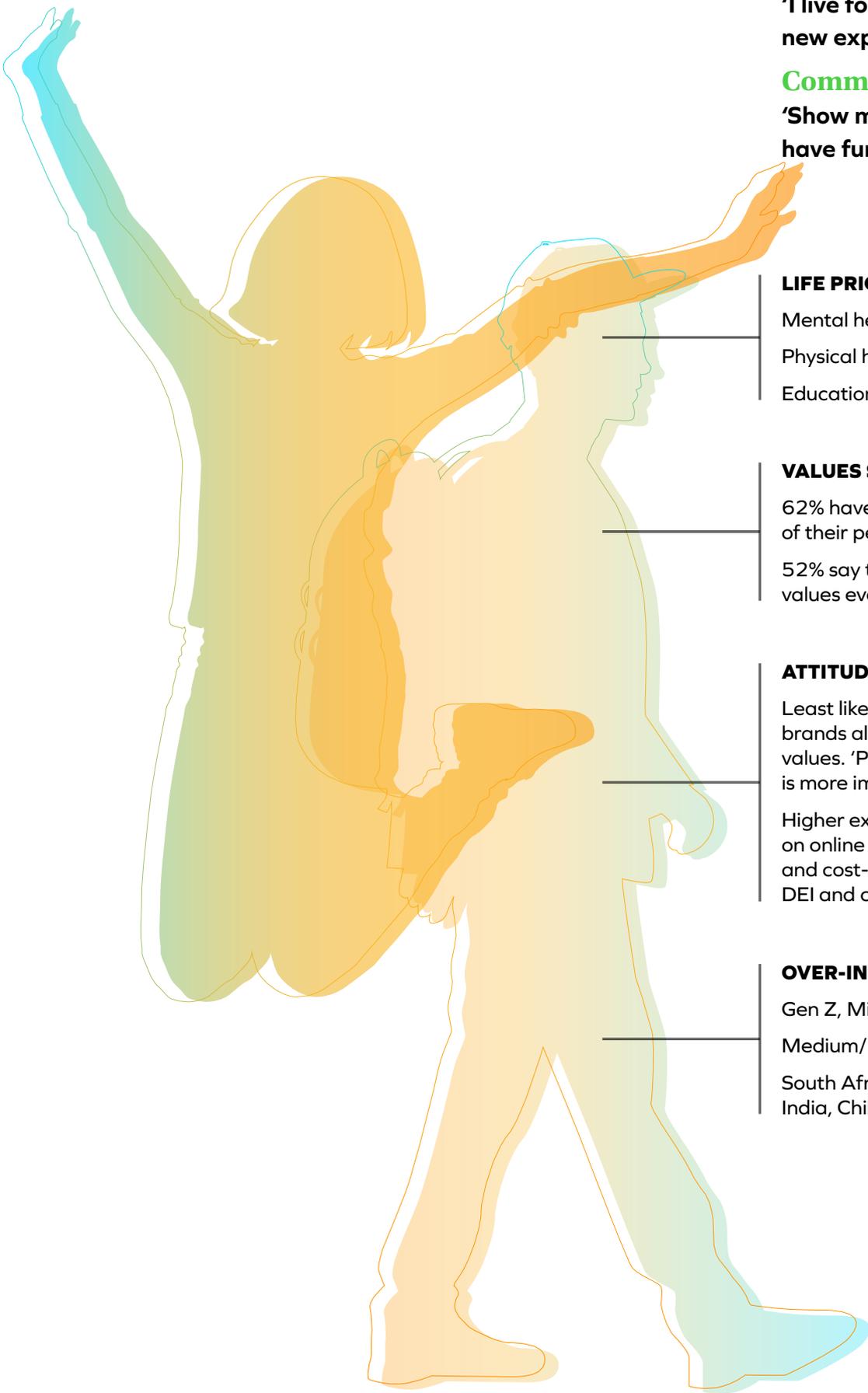
- Gen Z, Millennials
- Slight male bias
- India, China, U.S., Turkey, UAE

The Adventurer

Seeks stimulating experiences and embraces novelty and exploration. Open-minded, independent and creative.



-  Hedonism
-  Stimulation
-  Self-direction



Philosophy

'I live for excitement and new experiences!'

Comms imperative

'Show me how I can have fun with this'

LIFE PRIORITIES

- Mental health and wellbeing
- Physical health
- Education and learning

VALUES SALIENCE

- 62% have a clear understanding of their personal values
- 52% say they live by their values every day

ATTITUDES & EXPECTATIONS

- Least likely with purchase brands aligned to personal values. 'Product quality' is more important.
- Higher expectations of business on online safety, data privacy and cost-of-living crisis than DEI and climate change.

OVER-INDEX

- Gen Z, Millennials
- Medium/high income
- South Africa, Argentina, India, Chile, U.S.

The Visionary

Values independence, personal freedom and creativity. Always considers the needs of others and the environment.



-  Self-direction
-  Universalism Societal
-  Universalism Nature



Philosophy

'I can do my own thing, but not at the expense of other people and the planet.'

Comms imperative

'Give me the freedom to explore, create and care.'

LIFE PRIORITIES

Adequate standard of living
Mental health and well-being
Financial security

VALUES SALIENCE

75% have a clear understanding of their personal values
61% say they live by their values everyday

ATTITUDES & EXPECTATIONS

Highest understanding of their values and pays a premium for brands positively impacting people and planet.
Has the greatest expectations of businesses and government.
Expects businesses to be transparent about data usage and governments to help protect against data breaches. Highly likely to act on climate change.

OVER-INDEX

Gen X
Female bias
South Africa, UK, Spain, Sweden, Netherlands, France

The Protector

Prioritizes people and planet and strives for equality for all. Feels a duty to act on issues important to them and appreciates other people's perspectives.



-  Benevolence
-  Universalism Societal
-  Universalism Nature

Philosophy

It's important to do the right thing, for everyone, everywhere.

Comms imperative

'Show me how you are going to help me make the world a better place.'

LIFE PRIORITIES

Equal rights for all
Access to quality healthcare
Climate change

VALUES SALIENCE

72% have a clear understanding of their personal values
64% say they live by their values everyday

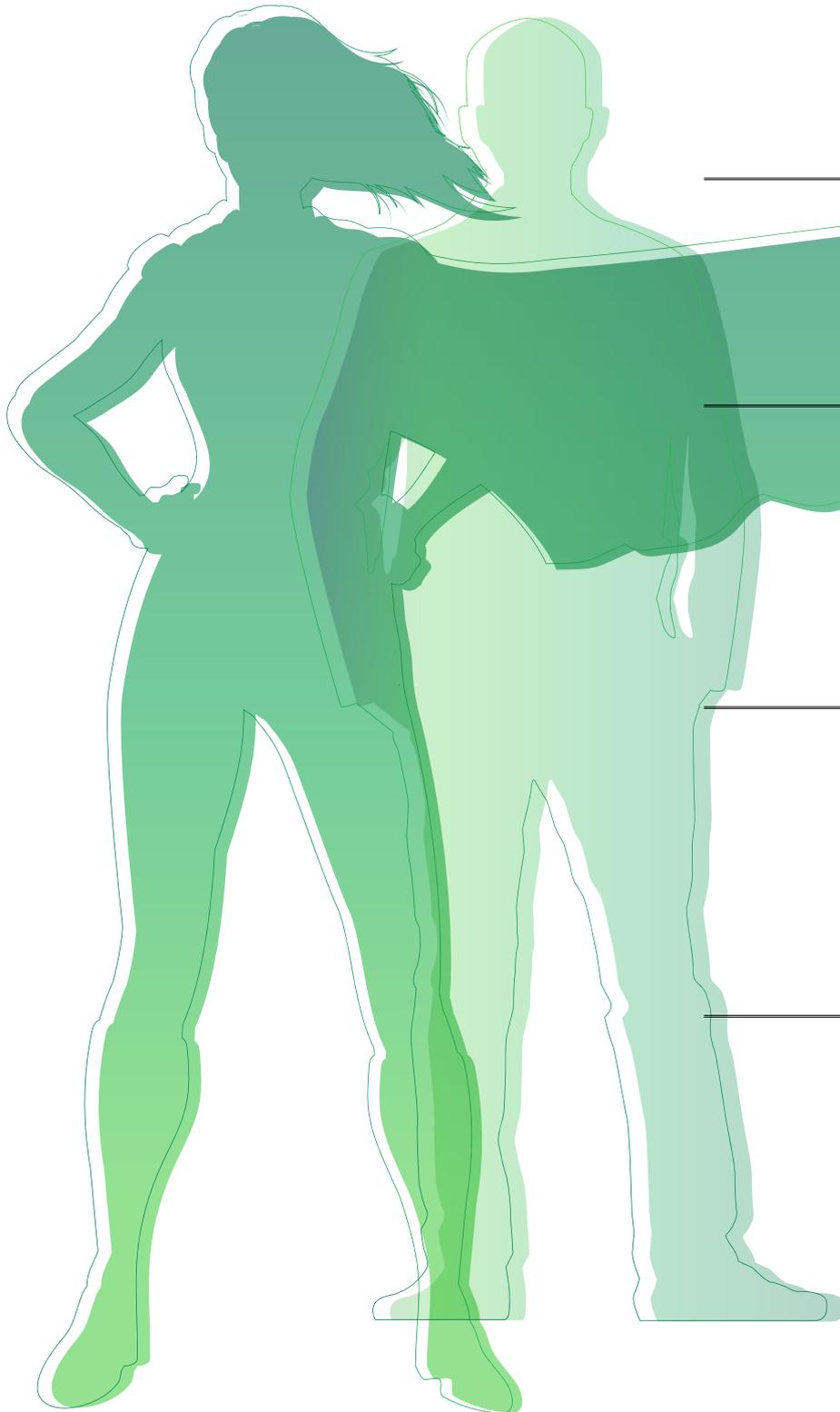
ATTITUDES & EXPECTATIONS

High understanding of values and lives them daily. Expects businesses, governments, and citizens to all do more to create a fairer society and to protect the planet.

Significantly more likely to act personally on climate change with pro-environmental behaviors such as optimizing home energy efficiency.

OVER-INDEX

Millennials, Gen X
Female bias
South Africa, UK, U.S., Brazil, Sweden



The Good Neighbor

Places great importance on the welfare of family, friends and community. Seeks harmony and treats people with loyalty and respect.



-  Benevolence
-  Universalism Societal
-  Security

Philosophy

'Treat others as you'd like to be treated.'

Comms imperative

'Show me how this helps me lead a good life.'

LIFE PRIORITIES

Mental health and well-being
Equal rights for all
Climate change

VALUES SALIENCE

55% have a clear understanding of their personal values
50% say they live by their values everyday

ATTITUDES & EXPECTATIONS

Represents the mainstay of the global population, with a focus on protecting family and friends.

Has 'average' expectations of business, governments and expects everyone to be treated equally.

OVER-INDEX

Gen Z, Millennials, Gen X
College educated
India, UK, UAE, U.S., Indonesia

The Traditionalist

Values stability, safety and harmony.

Wants to protect the status quo for the benefit of self, family and society.



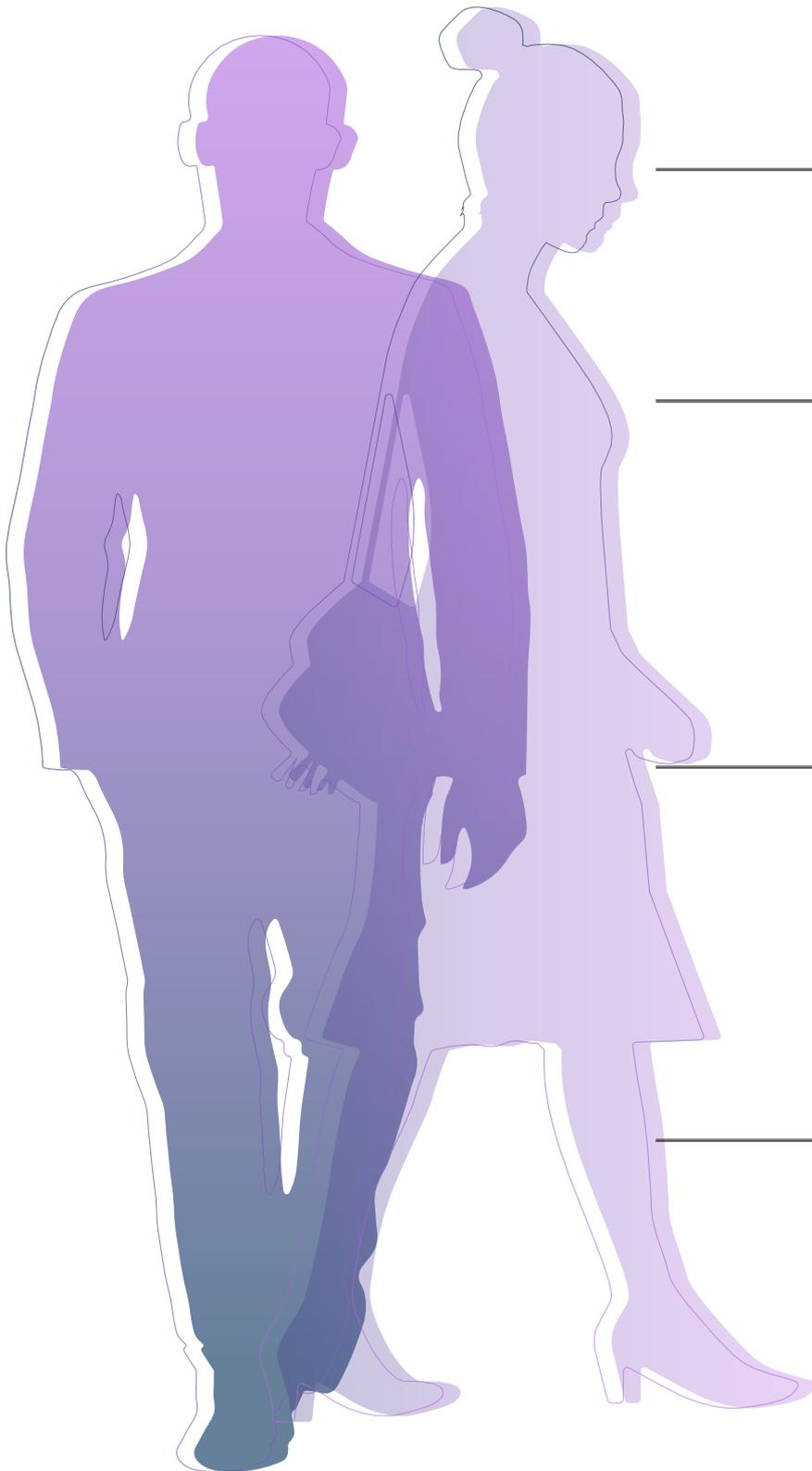
-  Security
-  Tradition
-  Conformity

Philosophy

'If it isn't broken, why fix it?'

Comms imperative

'Respect the status quo and help me feel secure.'



LIFE PRIORITIES

Adequate standard of living
Mental health and wellbeing
Financial security

VALUES SALIENCE

67% have a clear understanding of their personal values
65% say they live by their values every day

ATTITUDES & EXPECTATIONS

Less motivated than others to pay more for purpose-led brands.

Of all, places the highest importance on online safety and data privacy.

Expects business to be transparent on data usage, government to educate the public on staying safe online, and social media platforms to do more to protect people.

Least likely to demonstrate pro-environmental behaviors.

OVER-INDEX

Gen X/Baby Boomers

Secondary education

UK, U.S., South Africa, Indonesia, Philippines, Nigeria, Canada

The Conformist

The Conformist wants to fit in above all else. Follows the rules and avoids confrontation in order to succeed.



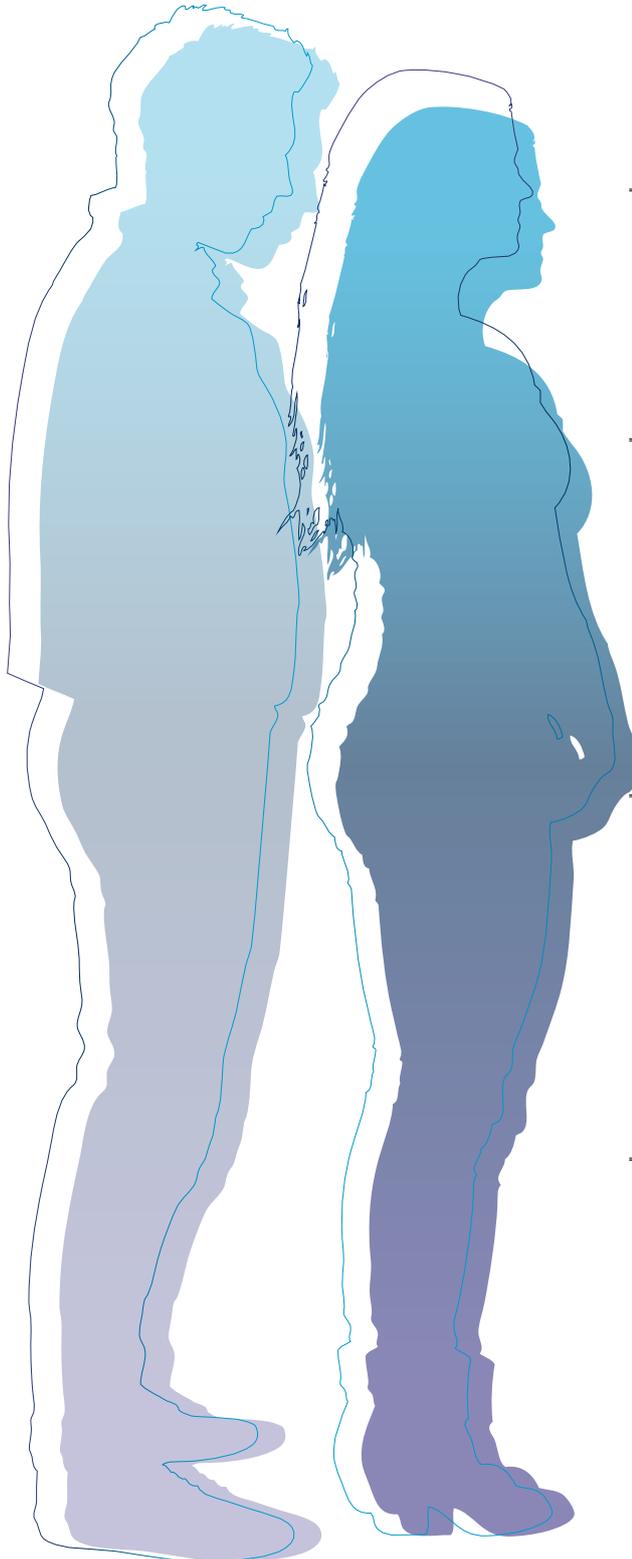
-  Conformity
-  Achievement
-  Power

Philosophy

'Stay in line to get ahead.'

Comms imperative

'Tell me how I can get ahead without ruffling any feathers'.



LIFE PRIORITIES

Financial security
Physical health
Adequate standard of living

VALUES SALIENCE

51% have a clear understanding of their personal values
48% say they live by their values every day

ATTITUDES & EXPECTATIONS

Least likely to say day-to-day behaviors reflect personal values. Least likely to believe that a brand's values are more important than its price.

Least engaged with issues of climate change and DEI.

Lowest expectations of businesses and governments in protecting and advancing people and the planet.

OVER-INDEX

Gen Z/Millennials
College-educated
India, UAE, UK, U.S.,
Japan, South Korea

Gen Z – not one

Gen Z dominates four Values Archetypes™.

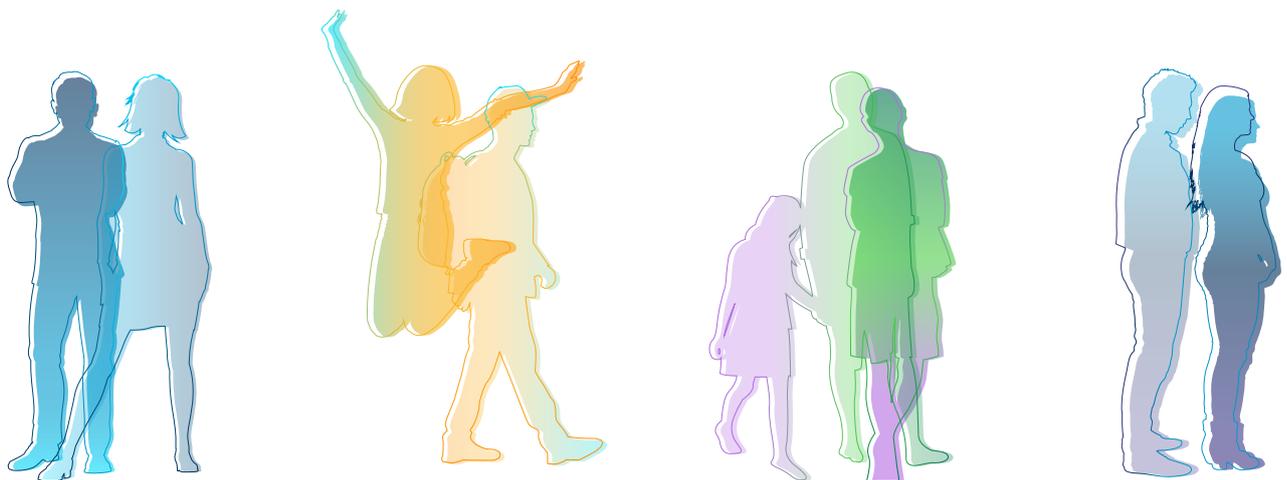
When it comes to Gen Z, we are overwhelmed by data, facts, and commentary, surprisingly little of which is globally inclusive or actionable. It creates the risk of defaulting to stereotypes which can undermine communications strategies.

We have shown that values vary across Gen Z. We also know that Gen Z is represented across all archetypes. But our analysis reveals that they dominate in four archetypes in particular.

When we set these archetypes, and their defining values, alongside each other, we see the values they share and those which set them apart from each other.

This nuanced understanding of such an important demographic allows communicators to engage and move them more effectively.

So go past the ‘what’ of Gen Z to truly understand the ‘why’.



SUCCESS SEEKER

- Achievement
- Power
- Hedonism

ADVENTURER

- Hedonism
- Stimulation
- Self-direction

GOOD NEIGHBOR

- Benevolence
- Universalism (S)
- Security

CONFORMIST

- Conformity
- Achievement
- Power



“Given the high proportion of Gen-Z across the world, this research is not only relevant to our current challenges but will continue to be of immense value in years to come.”

HESTER VAN HERK,
Professor of Cross-Cultural Marketing
Research at VU, Amsterdam

Where the Seven live

Values Archetypes™ by cultural regions.

Ranked by volume, showing where each value over and under indexes.

Key

Aa This Archetype over-indexes
(is more prevalent than average)
in this cultural region.

Aa This Archetype under-indexes
(is less prevalent than average)
in this cultural region

English-Speaking

Success Seeker

Good Neighbor

Traditionalist

Conformist

Protector

Adventurer

Visionary

Southern Europe

Good Neighbor

Protector

Success Seeker

Traditionalist

Adventurer

Visionary

Conformist

Northern Europe

Good Neighbor

Success Seeker

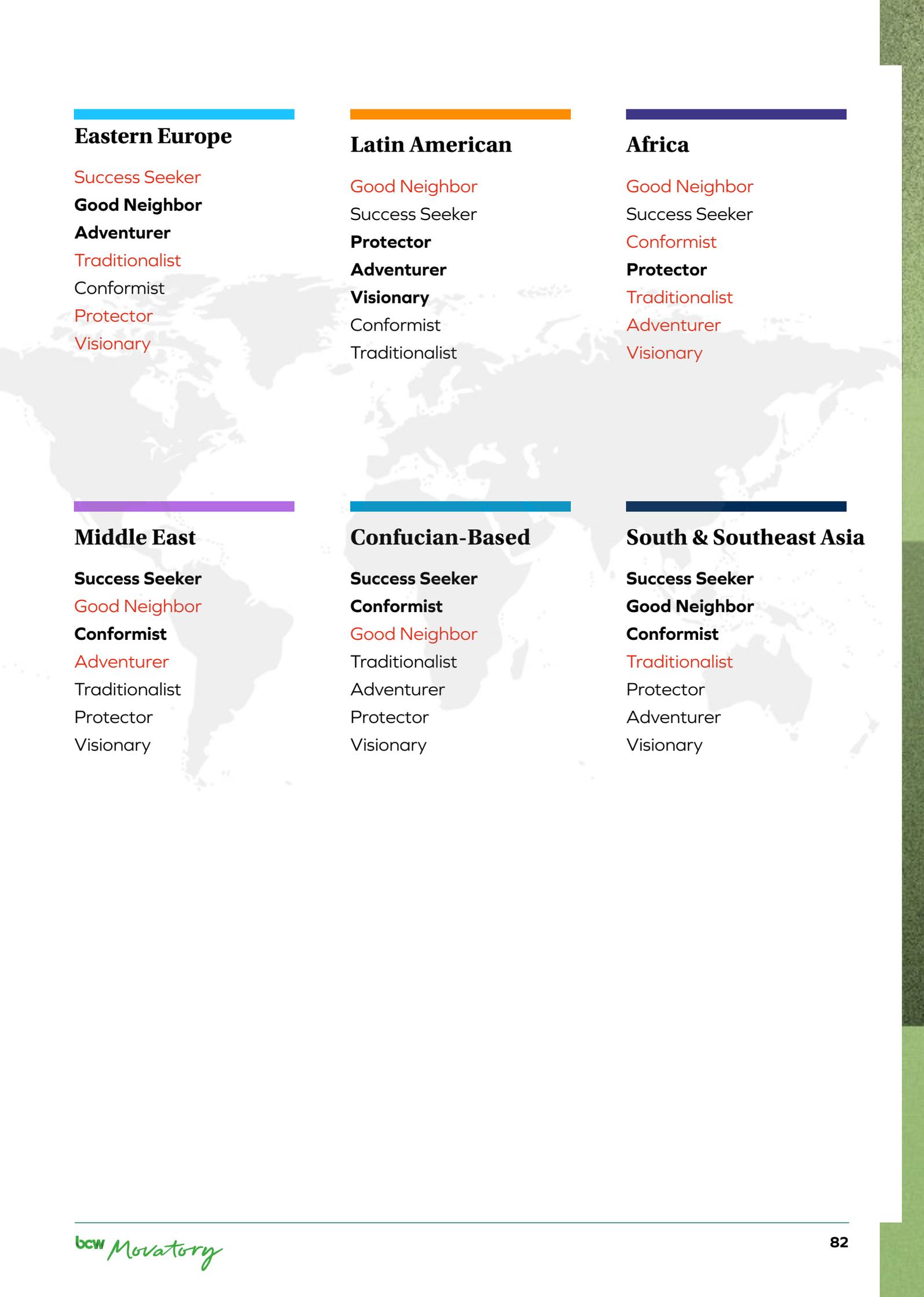
Protector

Visionary

Adventurer

Conformist

Traditionalist



Eastern Europe

Success Seeker
Good Neighbor
Adventurer
Traditionalist
Conformist
Protector
Visionary

Latin American

Good Neighbor
Success Seeker
Protector
Adventurer
Visionary
Conformist
Traditionalist

Africa

Good Neighbor
Success Seeker
Conformist
Protector
Traditionalist
Adventurer
Visionary

Middle East

Success Seeker
Good Neighbor
Conformist
Adventurer
Traditionalist
Protector
Visionary

Confucian-Based

Success Seeker
Conformist
Good Neighbor
Traditionalist
Adventurer
Protector
Visionary

South & Southeast Asia

Success Seeker
Good Neighbor
Conformist
Traditionalist
Protector
Adventurer
Visionary



**values move
people**

How values move people: climate change

Values influence pro-environmental behavior more than demographics

Climate change is one of the greatest challenges we face.

And we know that there is a correlation between people's likelihood to adopt pro-environmental behaviors and demographic characteristics.

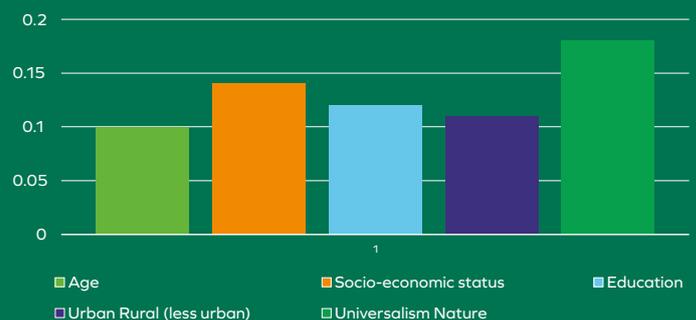
For instance, youth, education, a higher socio-economic status, and living in an urban setting all increase the likelihood of pro-environmental behaviors.

But we have found that values are a stronger predictor of pro-environmental behavior than standard demographics.



Universalism Nature motivates us to promote the preservation of the natural environment; it emphasizes the protection of nature and animals.

Predictors of climate change behavior



This graph shows that the relationship between values and pro-environmental behavior is up to twice as strong as demography and pro-environmental behavior.

¹ This chart shows correlations between a range of variables and propensity to act on climate change. For ease of interpretation only the strength of the relationship is depicted, not the direction. Age and Living in an Urban setting are negative correlated with propensity to act on climate change.

스낵전문점



명호당

SINCE 1980

2F



명호당

스낵전문점

de Paris



화피자

즉석떡볶이

화덕피자 & 떡볶이

即席トッポッキ

ARITAUM

미도리가방

みどりかばん

ARITAUM

DANIELA CO.

얼짱

몸짱

명동점 779-8286

영터리

생고기

무한리필

영터리

생고기

두번째 이야기

무한삼겹

UNGTEORI KOREA BBQ

1사 14,800원

Ice & Cake

ium factory

fo de Paris

2009

세마

LED sign with colorful characters

LED sign with colorful characters

FASHION HONG

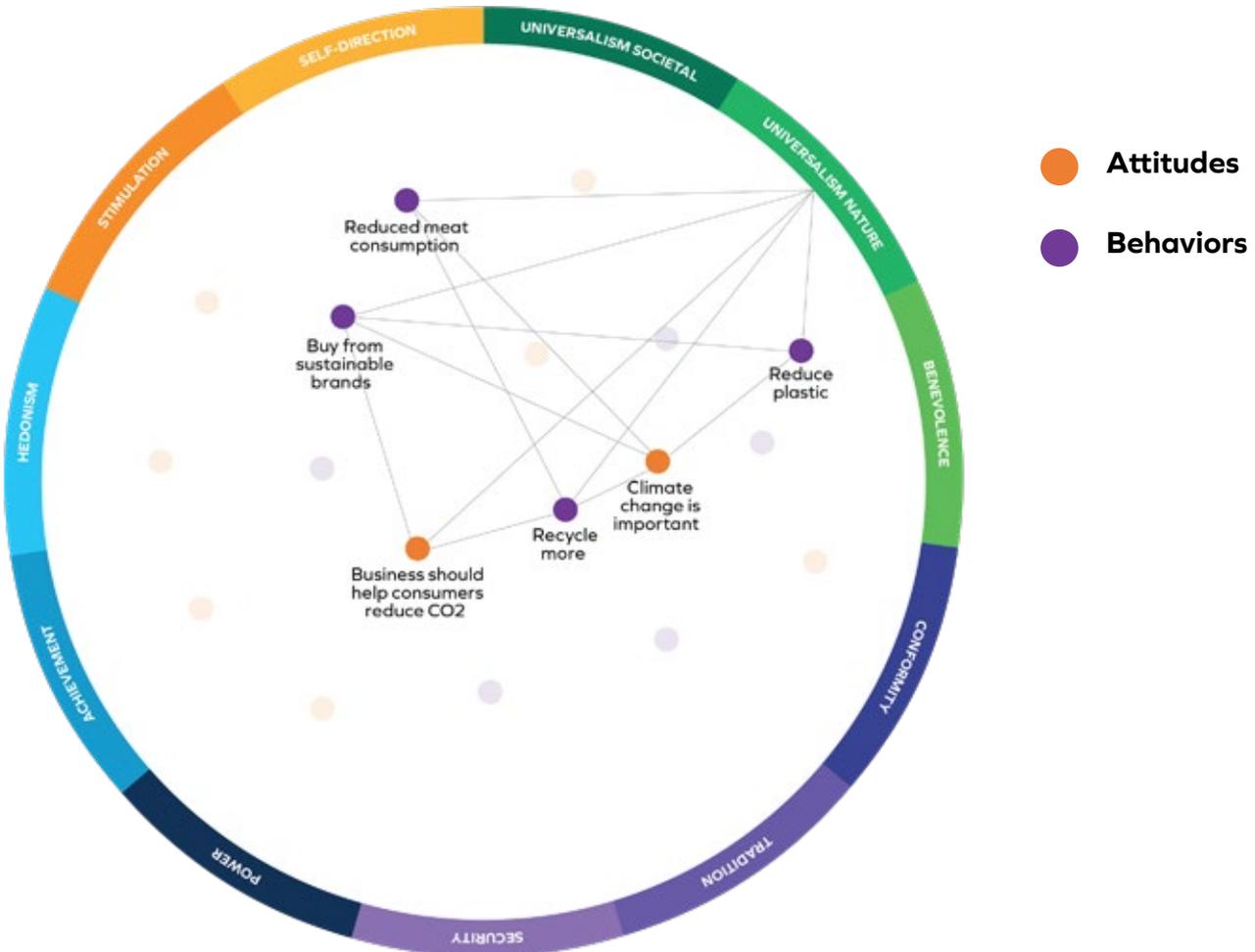
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TAX FREE



... but it might not be the values you expect

The Values Network™: what moves people on climate change



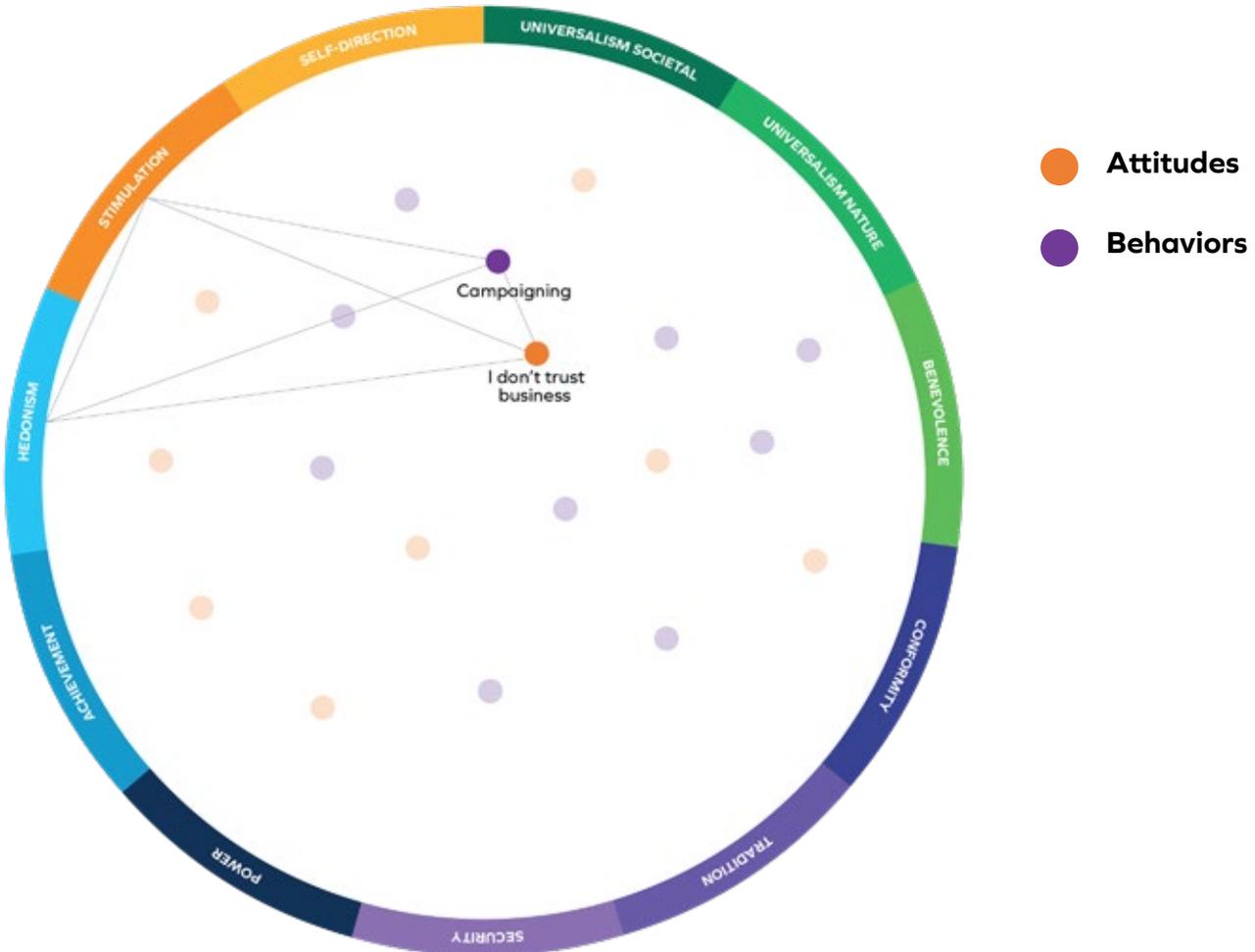
Universalism Nature motivates us to promote personal pleasure and enjoyment; it emphasizes self-indulgence and sensuous gratification.

A Values Network visualizes relationships between values and behaviors and other moderating factors, such as attitudes and life priorities to help us understand which values are driving which behaviors.

Here, we see the primary values driving pro-environmental behaviors tend to be associated with Universalism Nature: a desire to promote the preservation of the natural environment and the protection of nature and animals.

... but it might not be the values you expect

The Values Network™: what moves people on climate change



Hedonism motivates us to promote personal pleasure and enjoyment; it emphasizes self-indulgence and sensuous gratification.



Stimulation motivates us to promote the pursuit of excitement and challenge in life; it emphasizes novelty, variety, and adventure.

But, on second glance, people's motivations are more complex.

For some people, climate change behaviors don't seem to be driven by concern for the environment at all.

For some, it's Stimulation that motivates pro-environmental behaviors: a desire for exciting and novel experiences that can be met in demonstrations and direct action for example.

For others, the values of Power and Achievement are dominant motivations: a desire for status and to be perceived as successful, probably through the public display of behaviors that are widely applauded.

"Our research shows that personal values have a central role to play when it comes to influencing behavior. A focus on values doesn't just make our campaigns and interventions more effective, it also makes them more human.

It allows us to drive behavior change by aligning with what's truly important in people's lives."

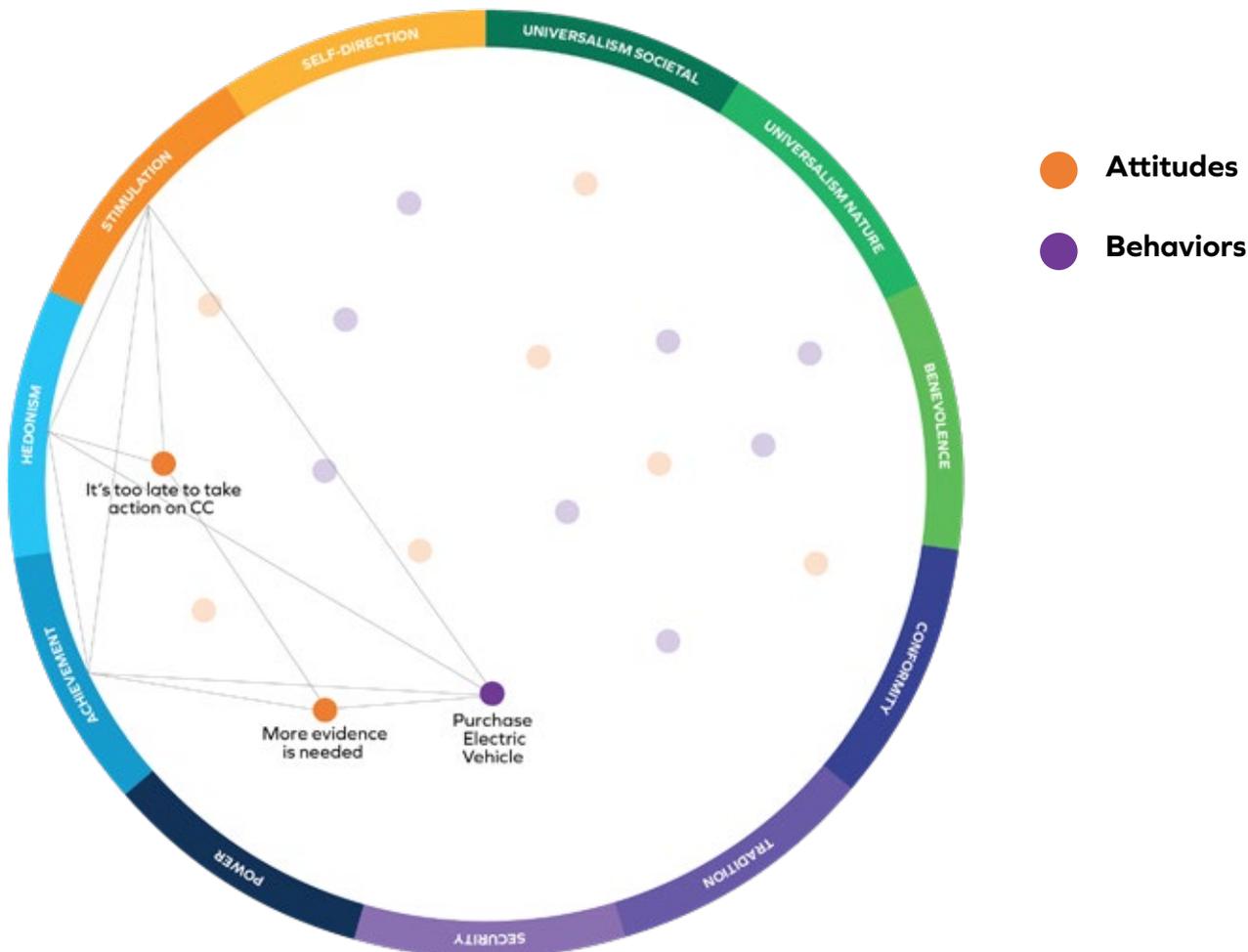
STEVEN JOHNSON

DIRECTOR BEHAVIORAL SCIENCE, BCW



The Values Network™ & the curious case of the electric vehicle

EV ownership is a great example of the dangers of making assumptions about values



 **Stimulation** motivates us to promote the pursuit of excitement and challenge in life; it emphasizes novelty, variety, and adventure.

 **Hedonism** motivates us to promote personal pleasure and enjoyment; it emphasizes self-indulgence and sensuous gratification.

 **Achievement** motivates us to promote personal success according to social standards; it emphasizes ambition and the demonstration of competence.

We used our Values Network™ to zoom in on why people buy EVs.

While you might expect Universalism Nature to be the dominant value which drives the purchase of an EV, our analysis showed that Hedonism, Stimulation and Achievement are much stronger values.

Significantly, these values are also associated with climate-skeptic attitudes, including a desire for more evidence on climate change and a feeling that it's too late to act.

This suggests that a significant group of consumers is motivated to purchase EVs because they are excited about their novelty and because they signal status – both virtue and wealth.

Attempts to get this group to buy EVs with appeals to protecting the environment risk falling on deaf ears.



What this means for communicators

Embrace values as your persistent truth in a world of change and uncertainty

In these volatile and uncertain times, values-based engagement is a new imperative for communicators.

Whether it's to attract talent, win votes, protect a license to operate, or drive sales conversions, communicators must speak to the persistent truth of people's values if they are to succeed.

If communicators root their communications in values, they will gain attention, drive engagement, and build trust, and they will be able to move people efficiently and effectively, today and tomorrow.

Five takeaways on values-based engagement

1. DON'T BE DISTRACTED BY THE NOISE, FOCUS ON VALUES

By using values as a constant guide, you will show up consistently and authentically in all your communicators. They will be able to navigate the changing context and conversation, rather than being derailed by it.

2. USE VALUES AS THE FOUNDATION FOR AUDIENCE INSIGHT

Values give communicators the key to moving people. They explain our motivations, attitudes, and behaviors in any given situation. By rooting strategy in an understanding of audience values, communicators can better predict how people will think, feel and act.

3. DEFINE YOUR VALUES TO ALIGN THEM WITH OTHERS'

In communications, as in life, good relationships are built on shared values. Knowing and articulating corporate or brand values will enable communicators to target and connect meaningfully with the consumers, stakeholders, partners, and talent who share them. This collaboration will enable business and brands to better achieve their goals.

4. USE VALUES TO MANAGE COMPETING EXPECTATIONS

Businesses, brands, organizations, and governments constantly have to manage many competing demands, e.g., on climate change; diversity, equity, inclusion; and online safety. Aligning corporate values with audience values and expectations can be a critical filter to help determine priorities.

5. CLOSE THE VALUES: BEHAVIOR GAP TO LEAD

The business, brands, and organizations that make it possible for people to shop, live, vote, and work according to their values, will flourish. Those that look forward, anticipate, identify, and close the values-behavior gap for people, will lead.

BCW Ages of Values 2023 Contributors

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**With thanks to all those
across BCW who shared their
interpretations of our data.**

Data Collection

Research was conducted in two waves between December 2022 and April 2023.

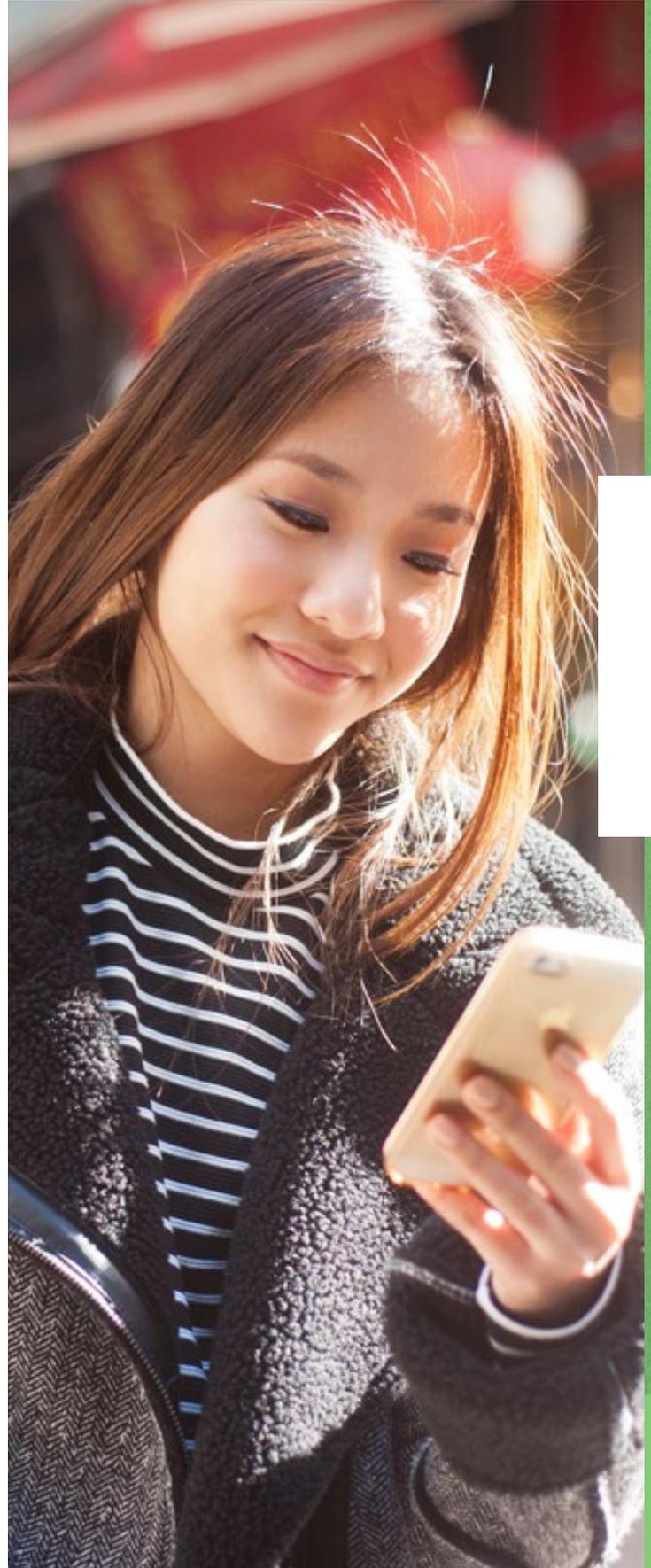
National representative samples were drawn from 30 markets worldwide, based on age, gender, and region. This created a total sample size of 36,000 respondents, between 1000 and 2000 per market. All respondents were over 18 and had access to the Internet.

These respondents were recruited through a validated commercial consumer panel and were given a small financial payment in return for their participation. Recruitment via an established consumer panel meant that all required consents and permissions for collection, analysis, and reporting were in place.

An online survey was completed, taking around 30 minutes. Questions include items relating to personal values, worldly concerns, attitudes, intentions, and behaviors. A range of demographic information was also collected regarding social status, education, and income.

Data Analysis

Our analyses used a range of techniques, including descriptive statistics, inspection of correlations, quantile regression, multilevel modeling and, Bayesian network analysis, to identify trends in the data and derive evidence-based insights.





bcw *Movatory*