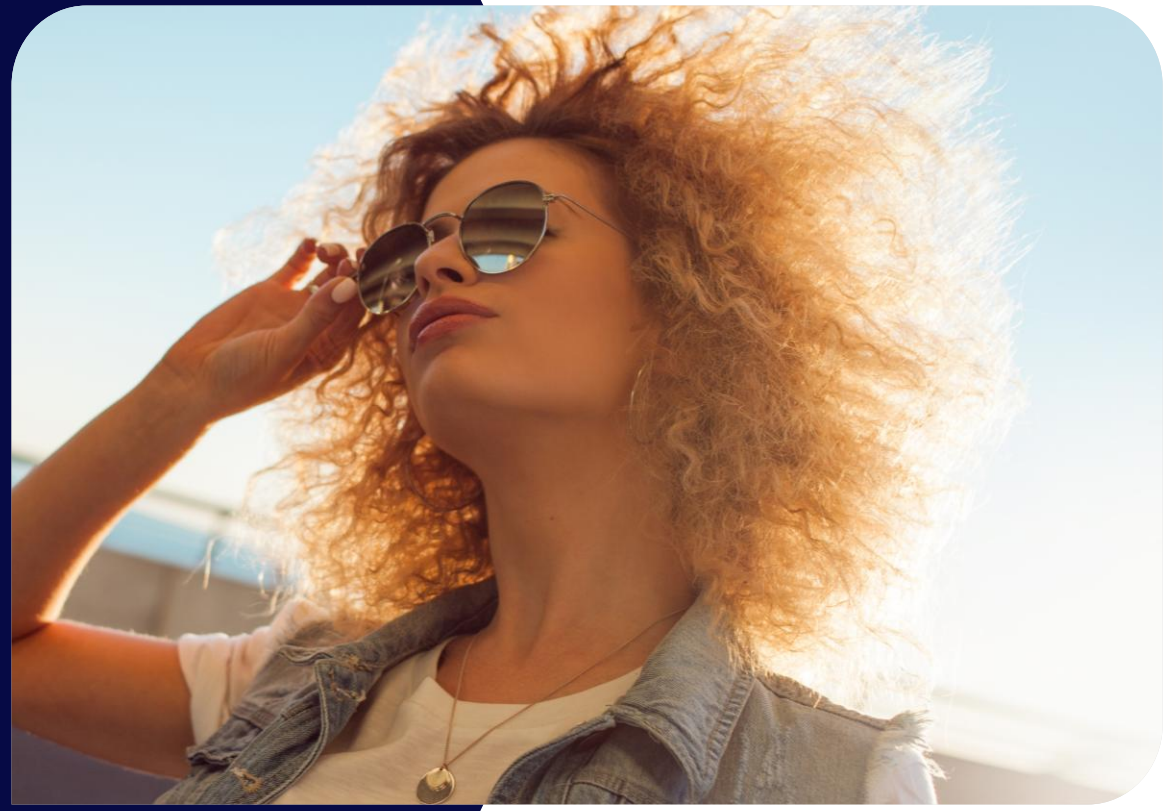
NielsenIQ

Values in the US

Part I. Values Perspective

SAMPLE REPORT

2026 US report



October 2026
NIQ Consumer Life US

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Why values?

- Personal values are the **guiding principles** in people's lives. They influence the way people live and the choices they make. Understanding and acting on consumers' values enhances brands' competitive advantage.
- Marketers can draw on an understanding of personal values to develop products and features that **meet consumer needs at a deeply held level.**
- Appealing to people's values in messaging will resonate with consumers and create a stronger connection, which will in turn **encourage loyalty**.
- Personal values provide an insightful way to **differentiate brands** from each other, including the competition.

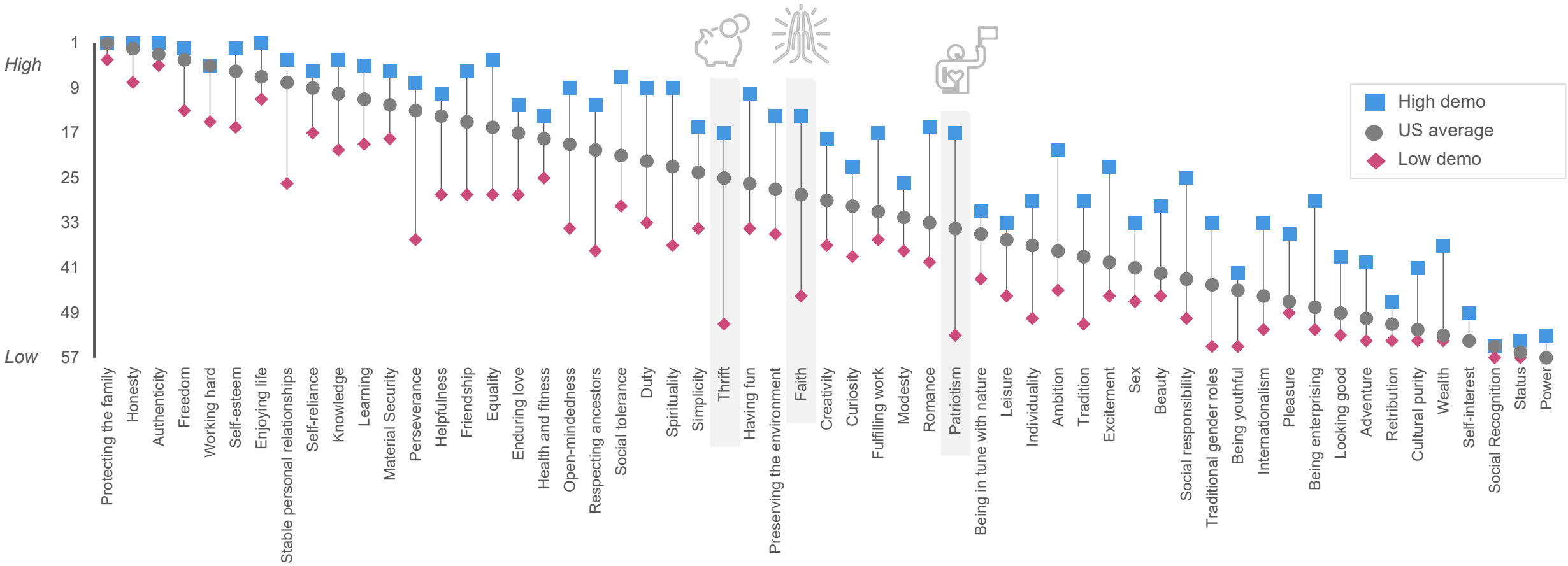
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Not homogeneous

Patriotism, followed by **Thrift** and **Faith,** demonstrates the greatest range by demographics

Americans across key demographic groups value **Protecting the Family, Honesty,** and **Authenticity** highly, while few value **Power**, **Status** or **Social Recognition**. In between, there is a lot of variation. **Patriotism,** followed by **Faith** and **Thrift**, shows the greatest divide by segment, ranking #17 among conservatives vs. #53 among Blacks.

Values ranks in the US



NIQ Consumer Life Global 2026 C1 (US filter)

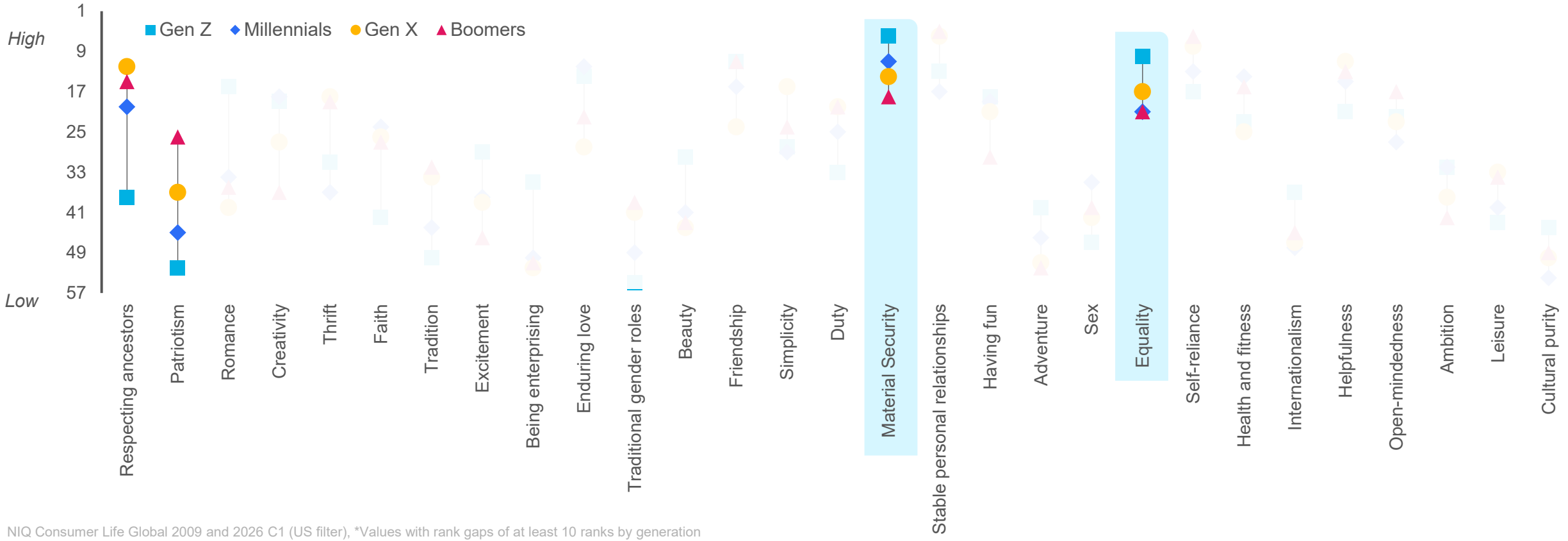
Notable variations across generations

Driven by both life-stage and formative experiences

Some of the values gaps by generation are life-stage driven. For example, younger people tend to seek out adventure and excitement in life, while older people are more focused on traditional values such as **Respecting Ancestors**, **Tradition**, and **Traditional Gender Roles**.

Other values seem more indicative of true generational imprints. For example, in 2009, Millennial teens and young adults placed below-average importance on **Material Security**, while **Equality** was broadly in line with national norms. Today, both values are markedly more important to Gen Z than to older generations, reflecting how each generation's formative experiences shape its priorities.

Differentiating values (ranks, US, sorted by gaps among generations)*

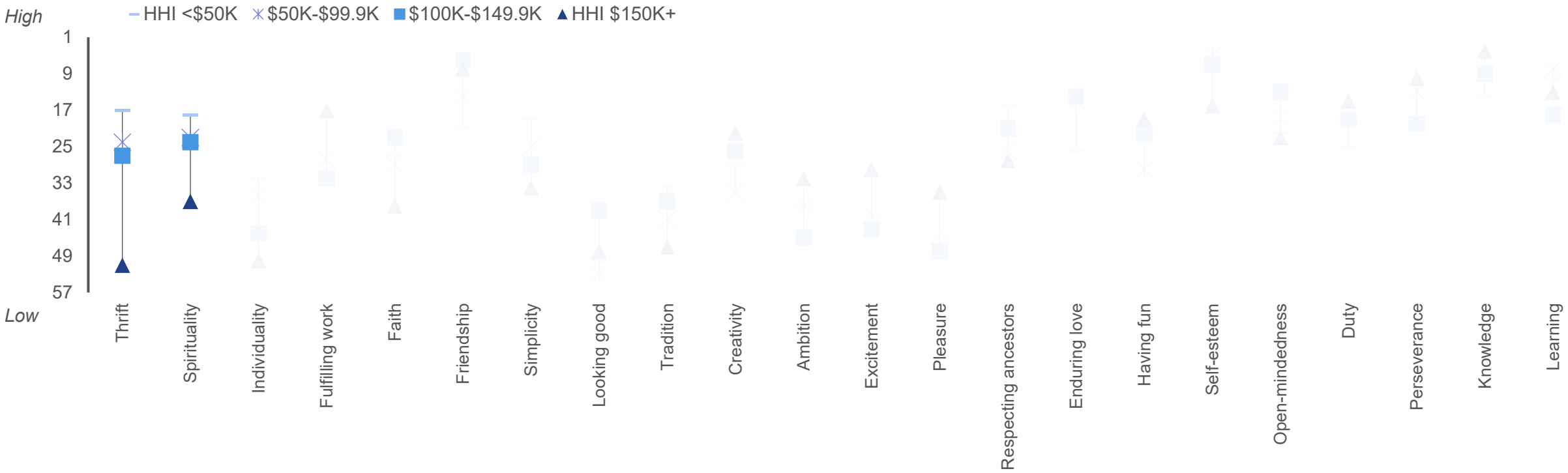


NIQ Consumer Life Global 2009 and 2026 C1 (US filter), *Values with rank gaps of at least 10 ranks by generation

Values influence and reflect financial wellness

High-income Americans prioritize **Fulfilling Work**, **Creativity**, **Ambition**, and **Excitement**, while low-income consumers lead on **Thrift** and traditional values such as **Spirituality**, **Simplicity**, and **Respecting Ancestors**

Differentiating values (ranks, US, sorted by gaps among income levels)*



NIQ Consumer Life Global 2026 C1 (US filter), *Values with rank gaps of at least 10 ranks by income

Some notable shifts across demographic groups

A more inward-looking America emerges, with wellness rising as tolerance, curiosity, fun, and youthfulness fade

Rising values in the US

	2026	Rank Δ from 2019	# of demo groups* with 2+ rank increases
Health and fitness	#XX	↑XX	19 groups out of 21
Being in tune with nature	#XX	↑XX	20
Spirituality	#XX	↑XX	19

Declining values in the US

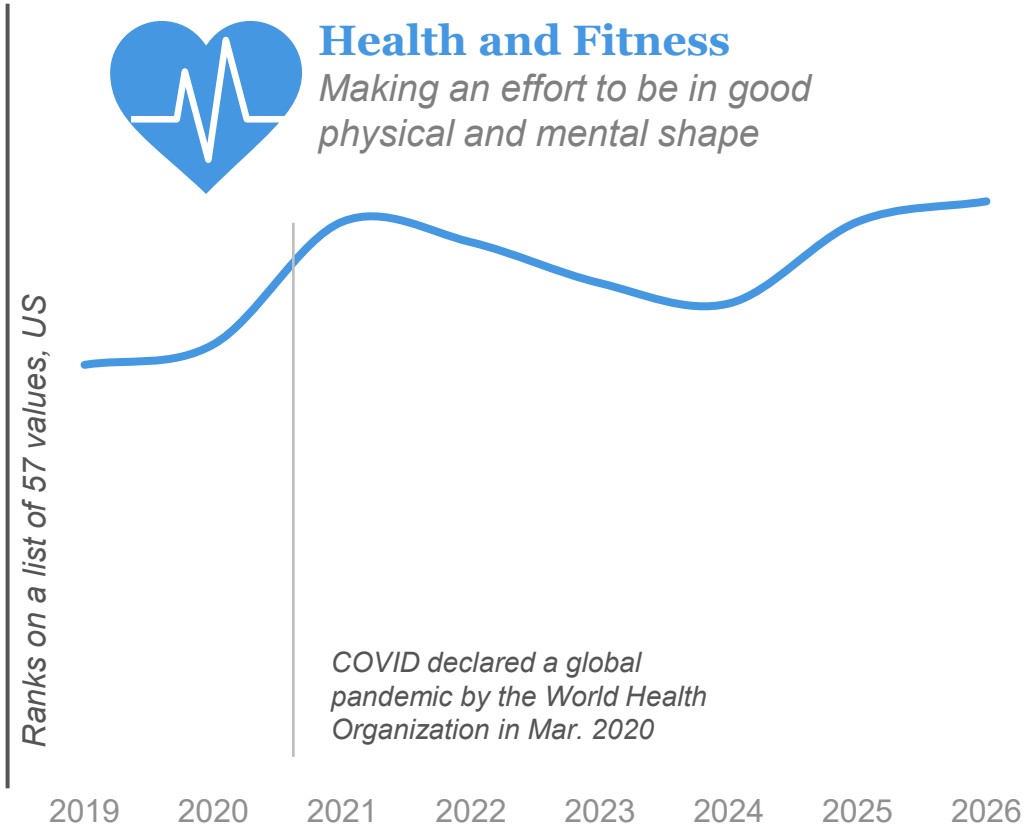
	2026	Rank Δ from 2019	# of demo groups* with 2+ rank decreases
Curiosity	#XX	↓XX	20 groups out of 21
Having fun	#XX	↓XX	13
Social tolerance	#XX	↓XX	15
Being youthful	#XX	↓XX	21

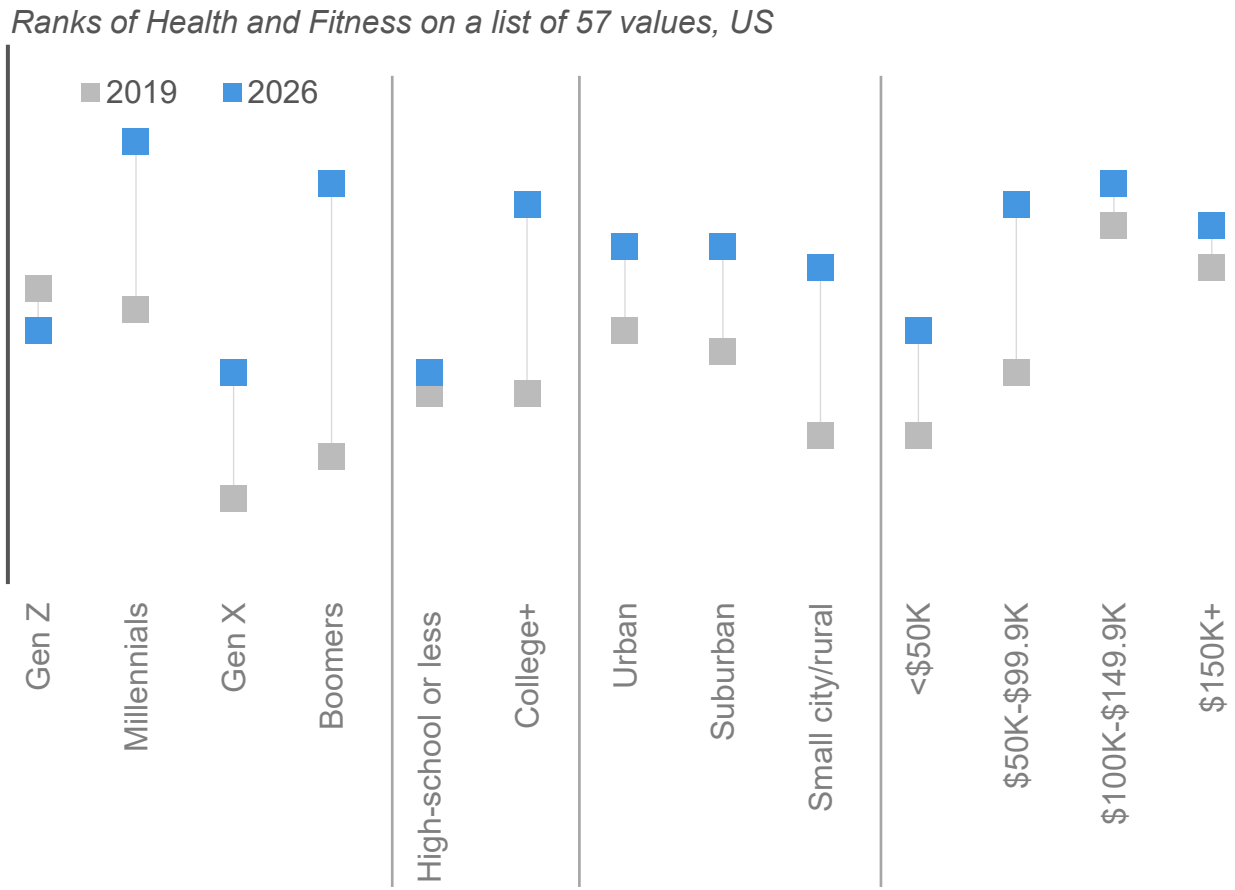
NIQ Consumer Life Global 2019 and 2026 C1 (US filter); *21 demographic groups consistently tracked with sufficient samples, including segments by gender (male, female), generation (Gen Z, Millennials, Gen X, and Boomers), ethnicity (White, Hispanic, Black), educational level (those with high-school or less education and college+ education), urbanicity (urban, suburban, and rural/small town dwellers), income (HHI < $50K, $50K-$99.9K, $100K-$149.9K, and $150K+), and employment (employed full-time, employed part-time, not employed); note small samples for those with HHI $150K+ in 2019 (n=64)



Health and Fitness sees a renewed interest after retreating from COVID highs

Aging Boomers, followed by their Millennial children, college graduates, the middle class, and small-town dwellers, report the biggest gains





NIQ Consumer Life Global 2019-2026 C1 (US filter), note small samples for those with household income of $150K+ in 2019 (n=64)

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Seeking inner peace, not just a good time

Spirituality overtook **Having Fun** as a core value

Ranks on a list of 57 values, US



Spirituality
Searching for peace and inner harmony

Having Fun
Having a good time

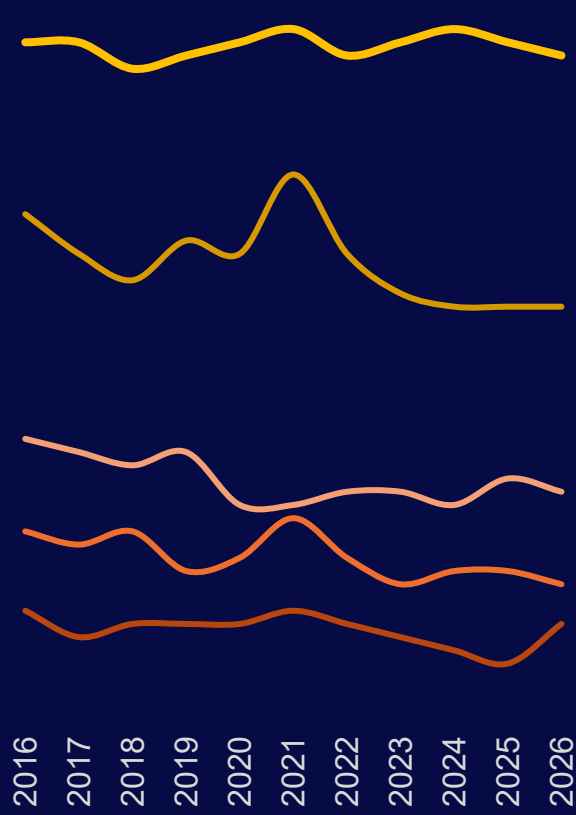
2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026

NIQ Consumer Life Global 2019-2026 C1 (US filter)

A nuanced approach towards experience

Enjoying what life can offer remains a top priority, but hardcore fun and indulgence are less relevant

Ranks on a list of 57 values, US



2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026

Enjoying Life
Doing things because I like them

Having Fun
Having a good time

Excitement
Having stimulating experiences

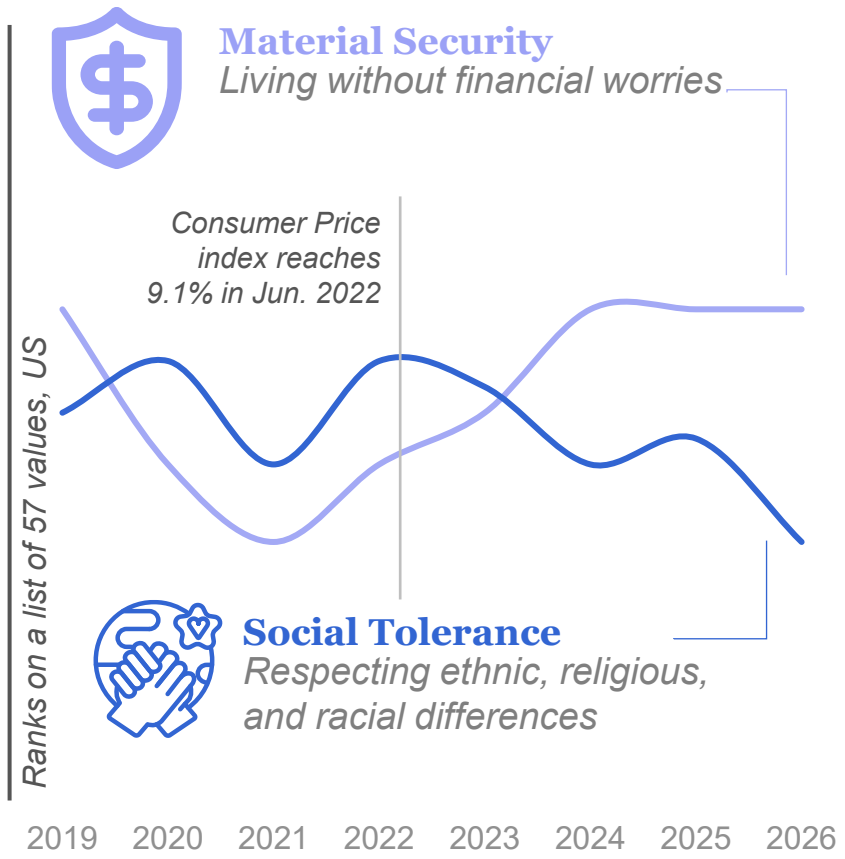
Pleasure
Indulging my desires

Adventure
Seeking adventure and risk

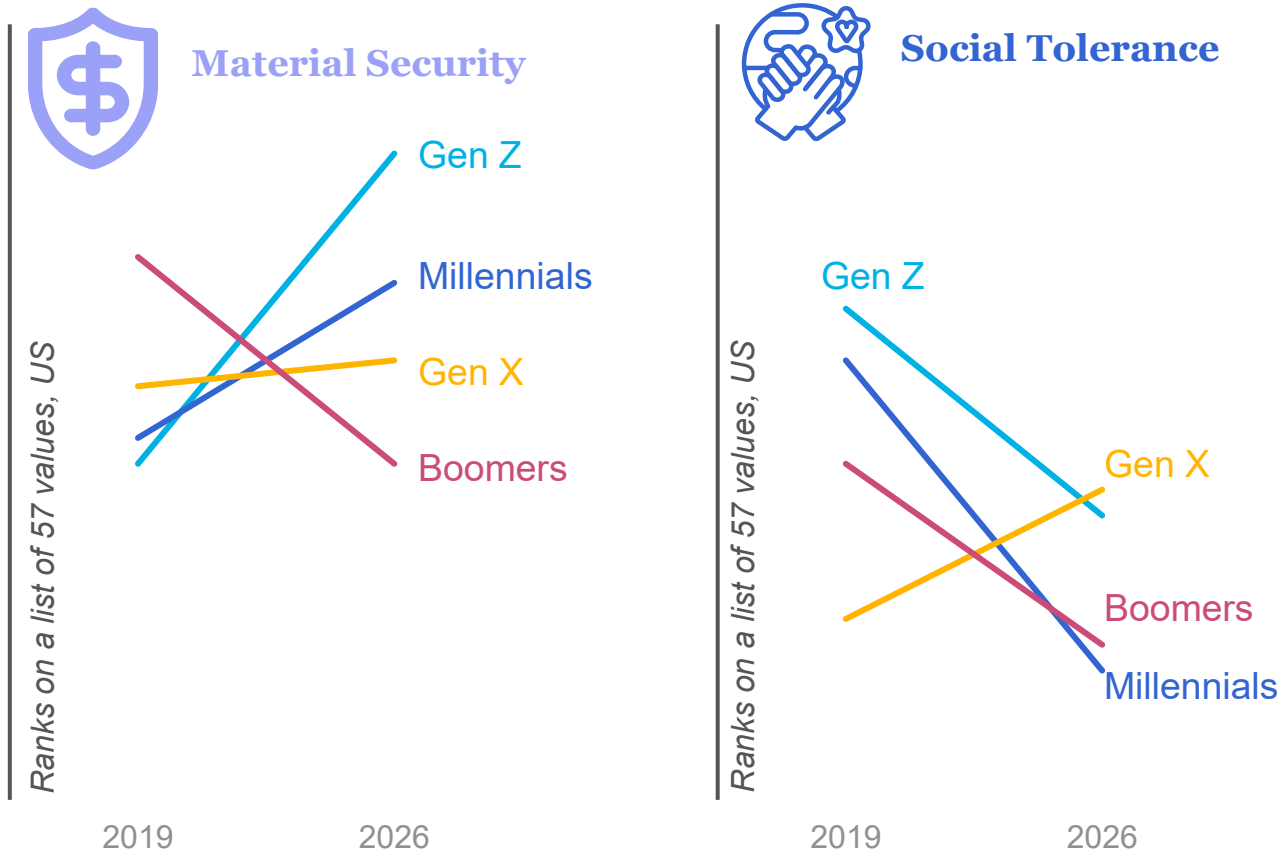
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Economic pressures may be contributing to a reduced outward focus

Material Security gained importance while **Social Tolerance** declined since 2022, when inflation reached a multi-decade high



Since 2019, the shift has been most pronounced among younger generations

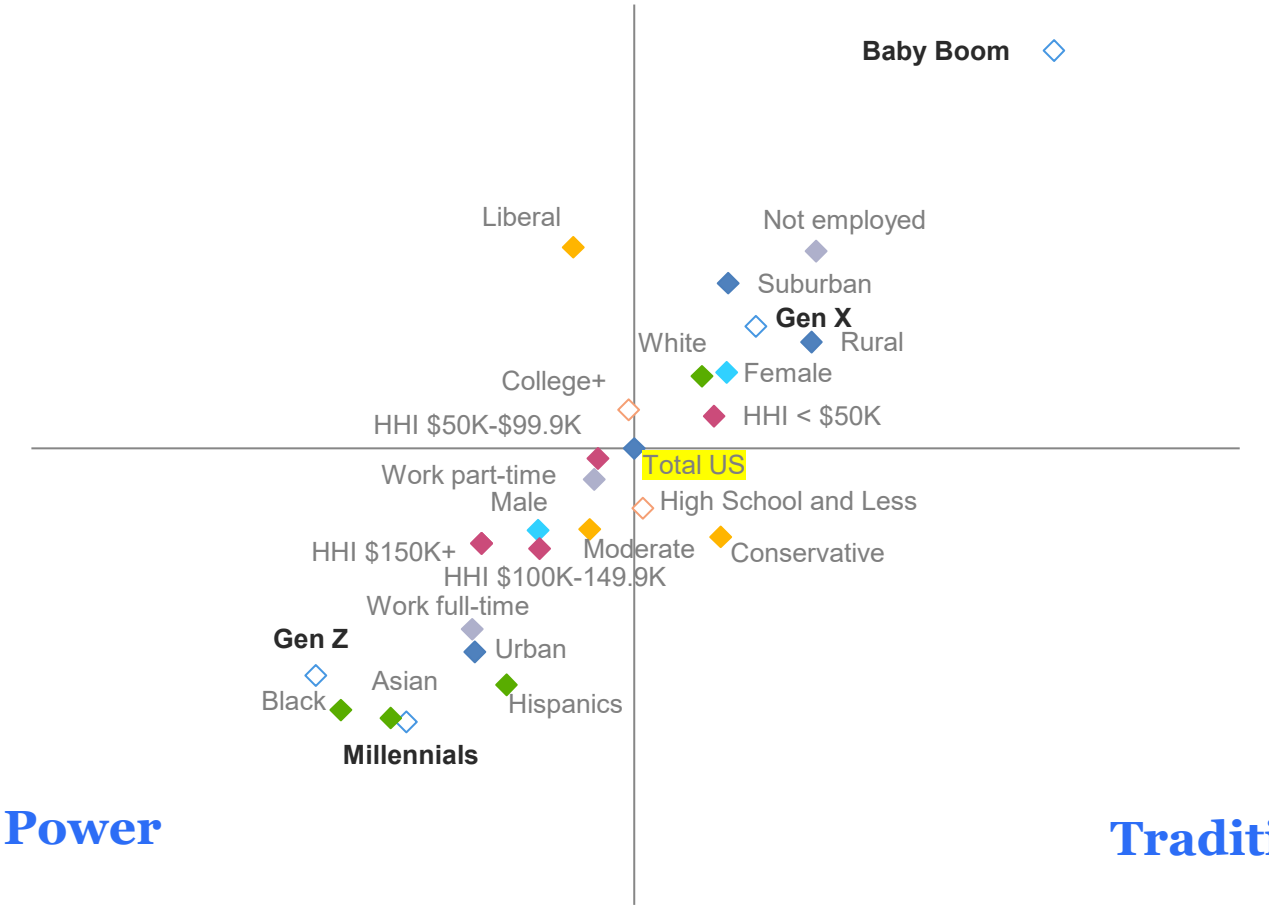


NIQ Consumer Life Global 2019-2026 C1 (US filter)

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A closer look at the American population in the values space

Boomers and younger generations are a world apart in values orientation



Boomers in the US are the most strongly pulled toward the People corner—a reflection of their high regard for values such as Stable Personal Relationships, Self-Reliance, and Freedom, paired with limited interest in achiever values such as Ambition and Status.

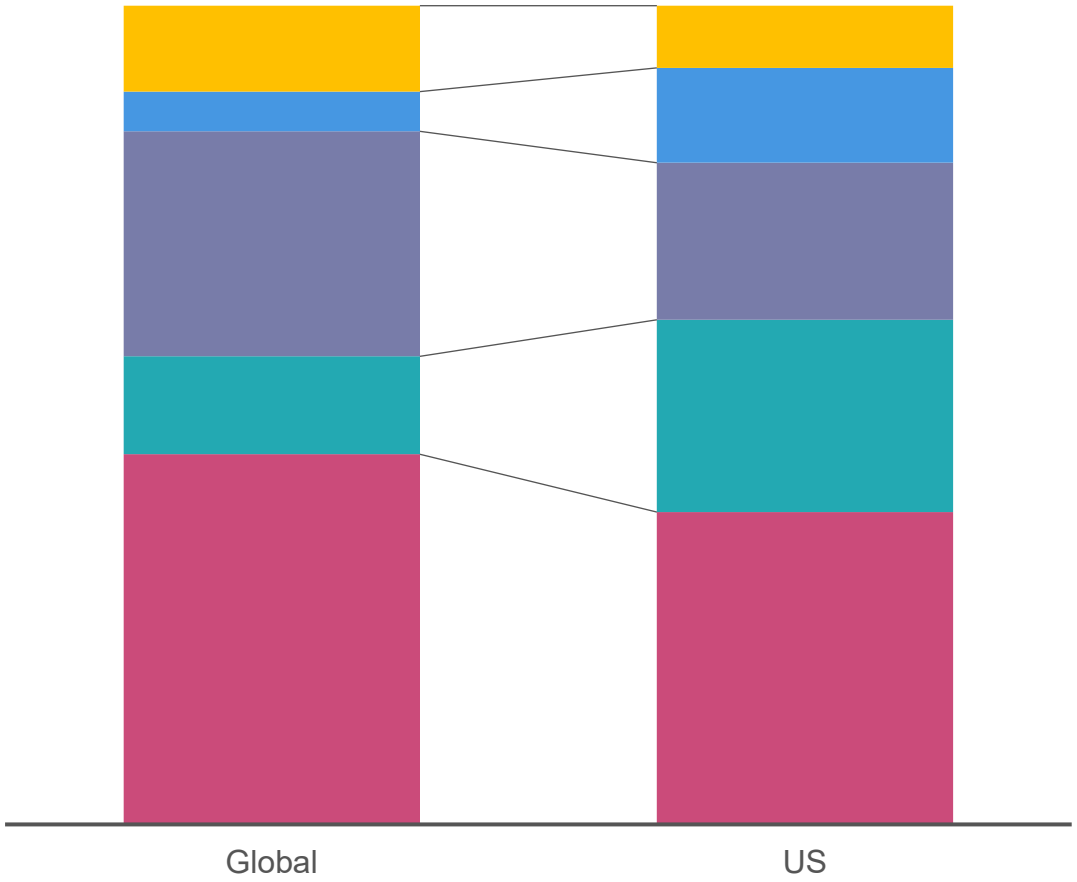
Gen Z and Millennials sit on the opposite side of the map, firmly in the Power space, closer in values to multicultural Americans and to the global average. What sets them apart is a markedly greater drive for personal success.

NIQ Consumer Life Global 2026 C1 (US filter)

Values segments are more evenly distributed in the US than globally

Compared with their global peers, Americans are less likely to be **Aspirers** and **Mindfuls** and more inclined to be **Elementals** and **Discoverers**

Values segment distribution (%)



Indulgers are self-centered pleasure-seekers who aren't too worried about anyone else. As long as they have the money they need to play, they're happy.

Discoverers are ethical explorers, open to everything the world has to offer. They appreciate nature, cultures, and people, and are concerned about treating them well.

Mindfuls are grounded individuals who anchor life in faith, family, and hard work. They want steady progress and good health, and brands they can depend on.

Elementals are plain-living traditionalists, the antithesis of Aspirers and Indulgers. Honesty, duty, and thrift guide them, and they are the most tech-wary.

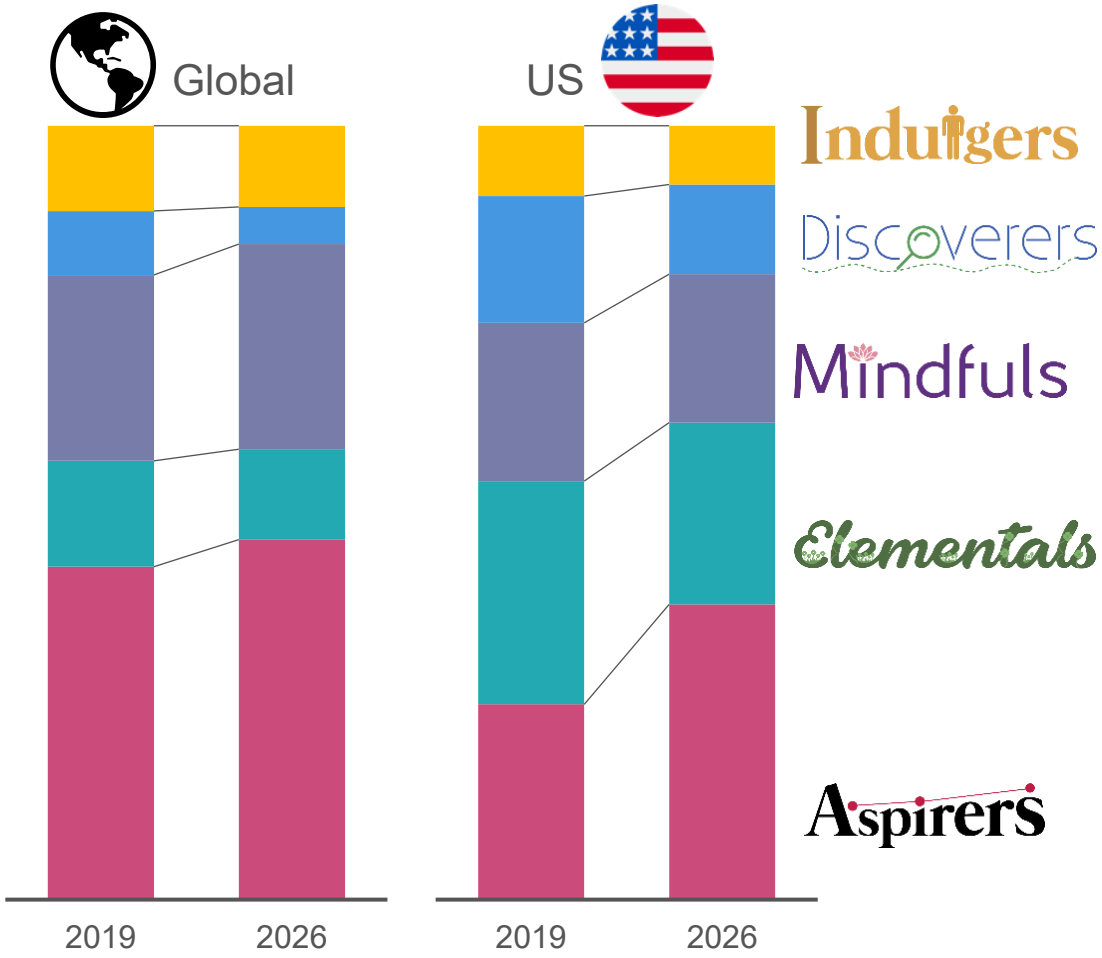
Aspirers are ambitious status-seekers who want recognition, wealth, and influence. Confident and tech-forward, they respond to brands that signal success and personal advantage.

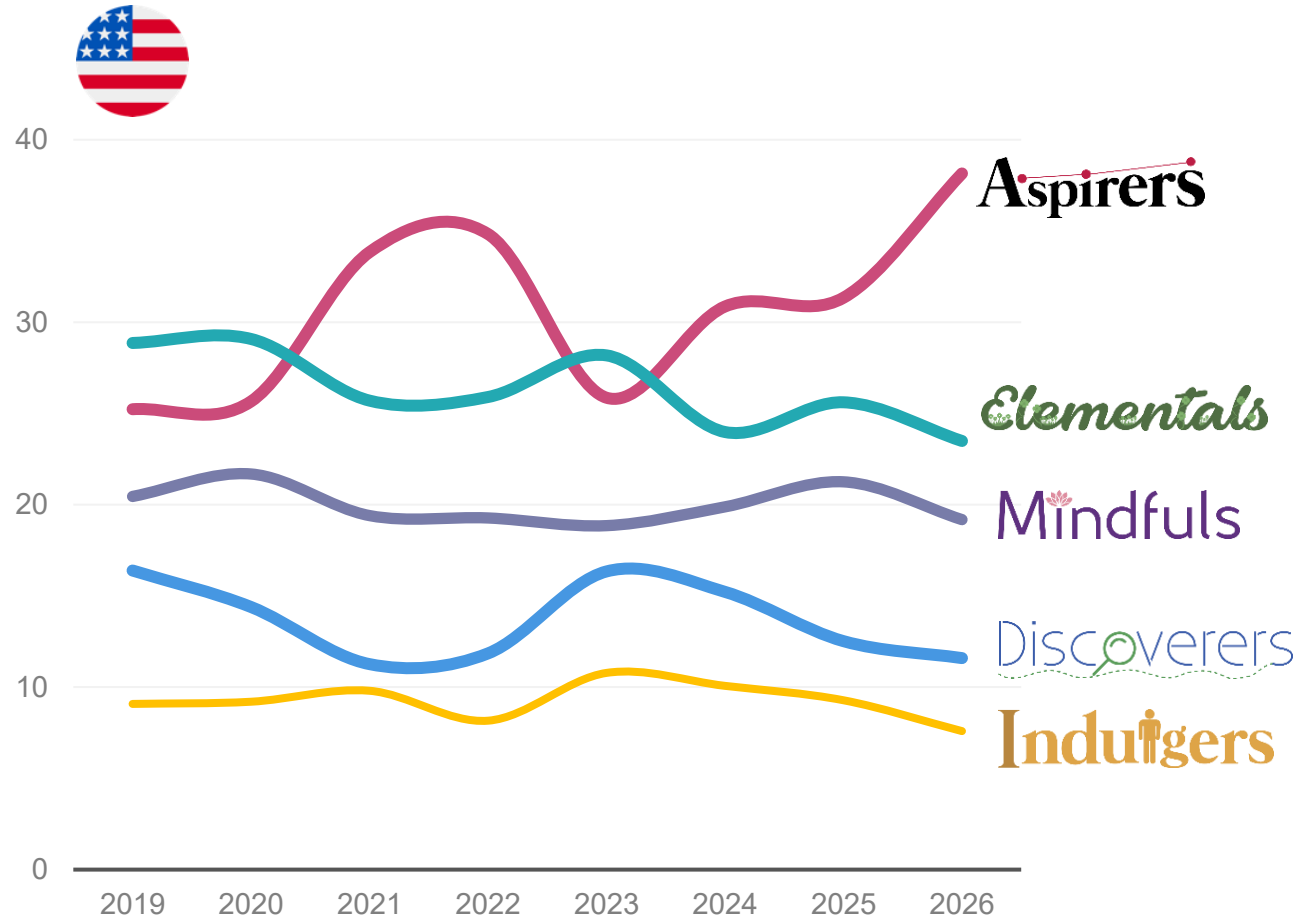
NIQ Consumer Life Global 2026 C1 (global = 39 countries)

Americans grew more aligned with their global peers in values orientation over recent years

Aspirers overtook **Elementals** to become the largest values segment in the US;
in addition to **Elementals**, **Discoverers** lost ground

Values segment distribution (%)





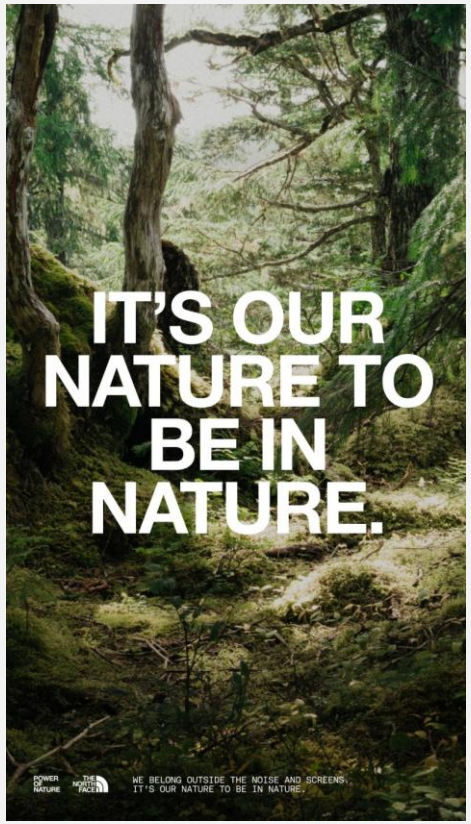
NIQ Consumer Life Global 2019-2026 C1 (global=core 18 countries), note 2026 global data is slightly different from what's shown on the previous slide due to different geographic coverage: trended global data shown on this slide represents the average across 18 consistently measured countries instead of all 39 markets covered in 2026

Connect with rising values (continued)

Companies can tap into people's growing desire to live in harmony with nature through products and brand positioning

Being in Tune with Nature
Fitting into nature

#XX personal value on a list of 57,
↑XX ranks from 2019



The North Face's "Power of Nature" campaign is a global movement dedicated to closing the nature gap by helping the next generation unplug from digital noise and realign with the physical world. It champions the idea that spending time outdoors is not just recreation, but a vital returning to our roots—a process that restores balance, inspires mindfulness, and fosters deep emotional resilience. "It's our nature to be in nature."





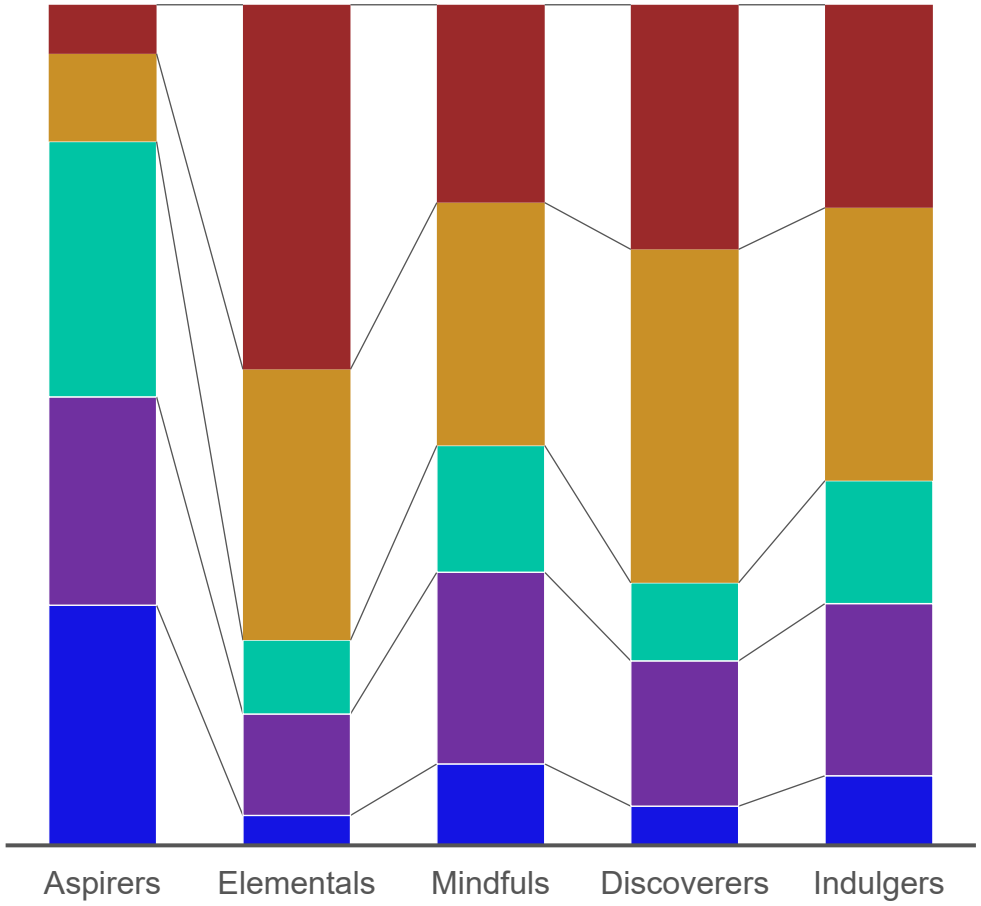
Instead of muting nature, **Hyundai Puerto Rico** celebrated it by replacing vehicle lock sounds with recordings of the region's native Coquí frog, positioning nature as something to embrace rather than shut out. The campaign won the Cannes Lions Audio & Radio Grand Prix.

NIQ Consumer Life Global 2019 and 2026 C1 (US filter), Power of Nature, Coquí Alarmed: Hyundai Puerto Rico

Leverage AI when connecting with Aspirers, passionate leaders on the AI journey

Take it slow with **Elementals**, the segment that falls the most behind with new technology

% distribution of AI Gauge™ segmentation



To learn more about the brand-new AI Gauge segmentation, please contact your Consumer Life representative.

new

Opt-Outs
Skeptics
Engage with AI the least and see more risk than benefit

Monitors
Cautious evaluators
Recognize AI's potential but remain concerned about its threats

Implementers
Practical adopters
Use AI when it delivers clear, tangible value for everyday needs

Beta-Testers
Explorers
Actively experiment with emerging AI tools while remaining pragmatic

All-Ins
Trailblazers
Deeply integrate AI into daily life and influence others as early adopters

NIQ Consumer Life Global 2026 (US filter)

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USA Values 2026:

Part II. Factbook

SAMPLE REPORT

NIQ Consumer Life US 2026

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1 Overview

2 Personal values

3 Values segments

A Appendix: Methodology

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57 Values

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Romance, Individuality, Helpfulness, and Working Hard set Americans apart the most from their global peers

Values ranks in USA, difference from global

Rank	Personal value	Δ from global
#1	Protecting the family	+0 rank
2	Honesty	0
3	Authenticity	1
4	Freedom	4
#20		
21		
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28		
29		
30		
31		
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57		

10+ ranks above global average | 5-9 ranks above average | 10+ ranks below average | 5-9 ranks below average

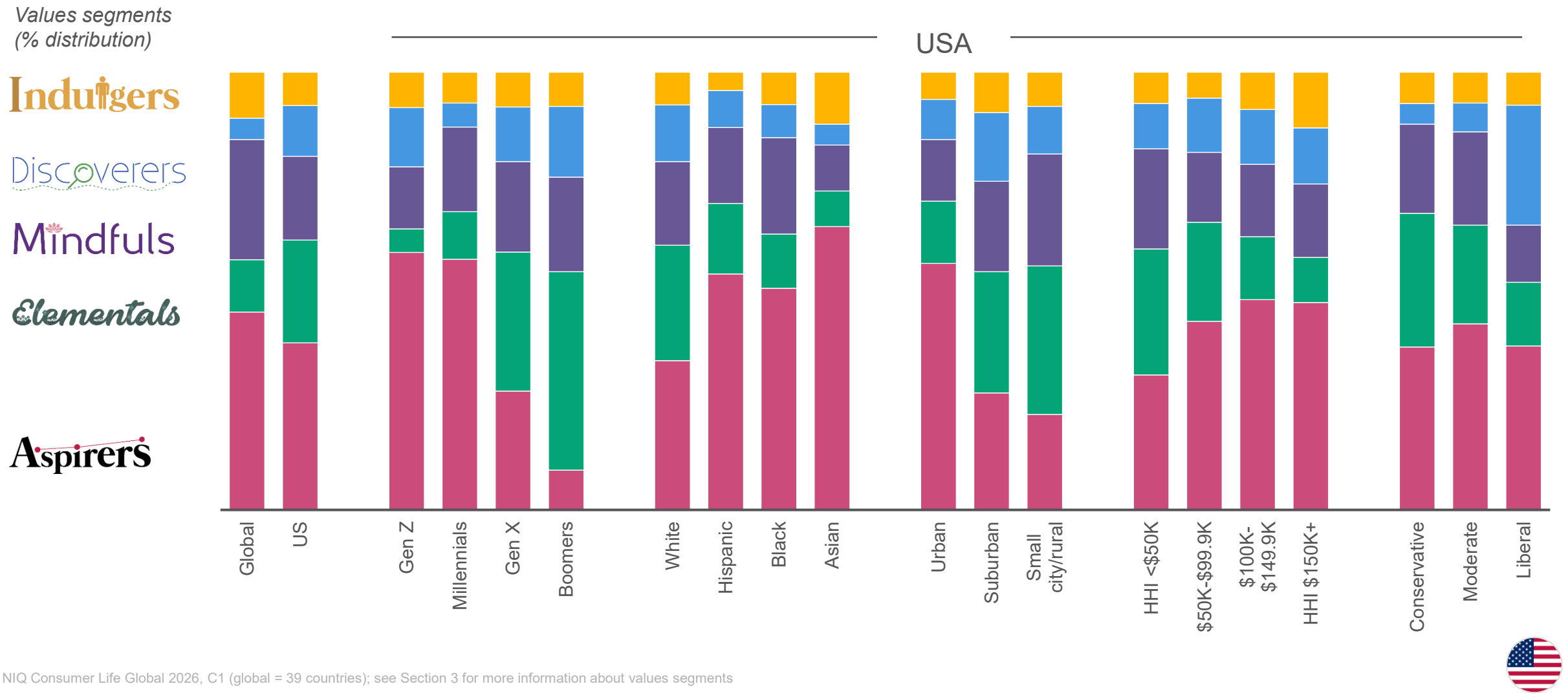
NIQ Consumer Life Global 2026, C1 (global = 39 countries)

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Five values segments

Aspirers are the most dominant values segment in America, led by younger generations, multicultural Americans, urban dwellers, and higher-income consumers

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NIQ Consumer Life Global 2026, C1 (global = 39 countries); see Section 3 for more information about values segments

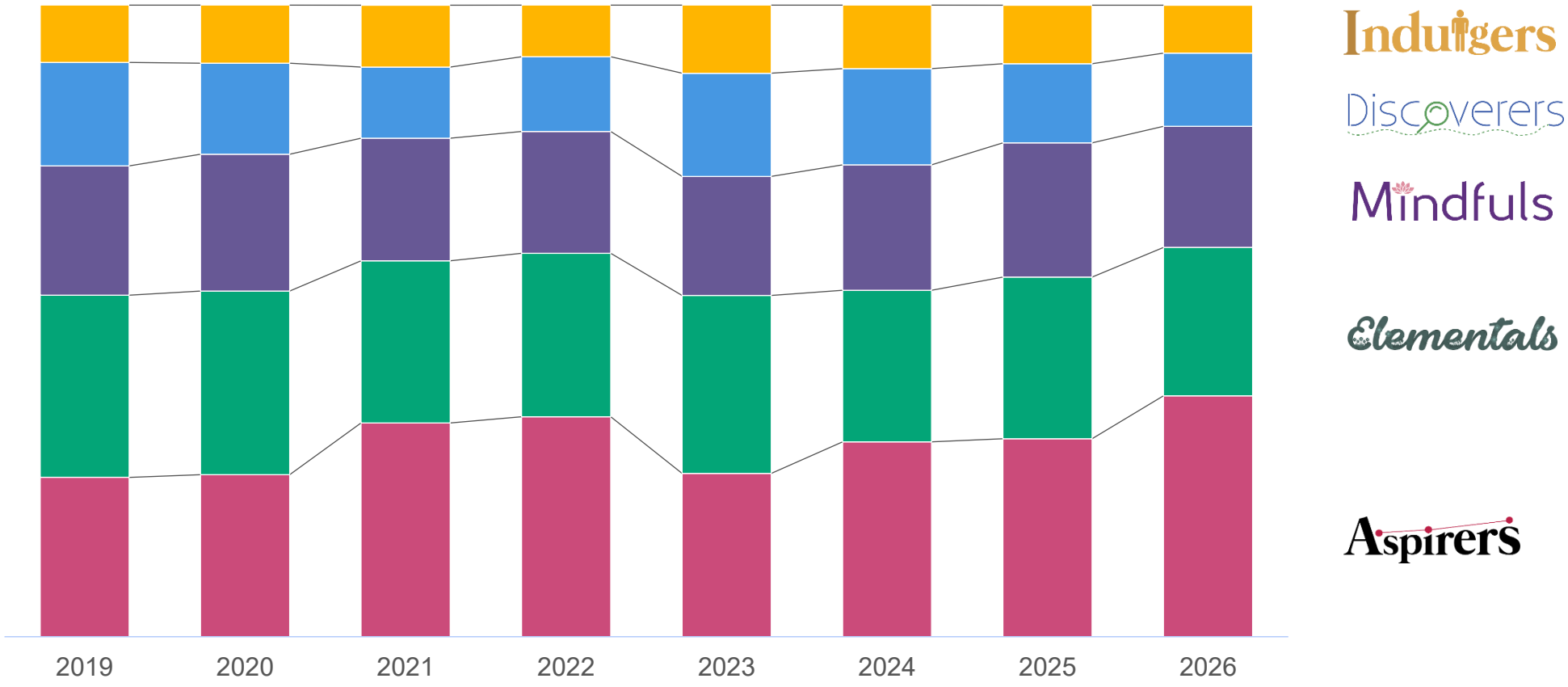
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Values segment trend

Aspirers gained at the expense of Elementals and Discoverers in recent years

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% distribution by values segment in USA, 2019-2026



NIQ Consumer Life Global 2019-2026, C1 (USA filter); see Section 3 for more information about values segments

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57 personal values

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CLICK ON VALUE TO LEARN MORE

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Adventure
Ambition
Authenticity
Beauty
Being enterprising
Being in tune with nature
Being youthful
Creativity
Cultural purity
Curiosity
Duty
Enduring love
Enjoying life
Equality
Excitement
Faith
Freedom
Friendship
Fulfilling work
Having fun
Health and fitness
Helpfulness
Honesty
Individuality
Internationalism
Knowledge
Learning
Leisure
Looking good
Material security
Modesty
Open-mindedness
Patriotism
Perseverance
Pleasure
Power
Preserving the environment
Protecting the family
Respecting ancestors
Retribution
Romance
Self-esteem
Self-interest
Self-reliance
Sex
Simplicity
Social recognition
Social responsibility
Social tolerance
Spirituality
Stable personal relationships
Status
Thrift
Tradition
Traditional gender roles
Wealth
Working hard

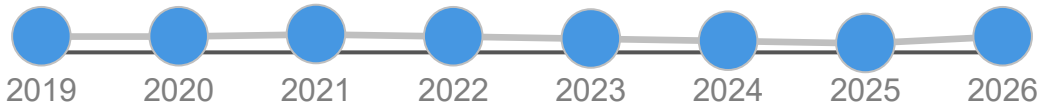
Adventure

Seeking adventure and risk

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#XX *out of 57 values in 2026*

Rank of value 2019-2026



HOW value relates to segments (index: total = 100)



Segment	Rank
Total	
Male	
Female	
Gen Z	
Millennials	
Gen X	
Boomers	
White	
Hispanic	
Black	
Asian	
Urban	
Suburban	
Small city/rural	
HHI <$50K	
$50K-$99.9K	
$100K-$149.9K	
HHI $150K+	
Conservative	
Moderate	
Liberal	

NIQ Consumer Life Global 2026, C1 (USA filter)

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Values segments

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5 values segments



Key values: Wealth, Social recognition, Looking good
They are ambitious status seekers who want recognition, wealth, and influence. Confident and tech-forward, they respond to brands that signal success and personal advantage.



Key values: Simplicity, Thrift, Tradition, Duty, Respecting ancestors
They are plain-living traditionalists, the antithesis of Aspirers and Indulgers. Honesty, duty, and thrift guide them, and they are the most tech-wary.



Key values: Faith, Spirituality, Patriotism
These are grounded individuals who anchor life in faith, family, and hard work. They want steady progress and good health, and brands they can depend on.



Key values: Curiosity, Open-mindedness, Social tolerance, Equality, Internationalism, Preserving the environment
They are ethical explorers, open to everything the world has to offer. They appreciate nature, cultures, and people, and are concerned about treating them well.



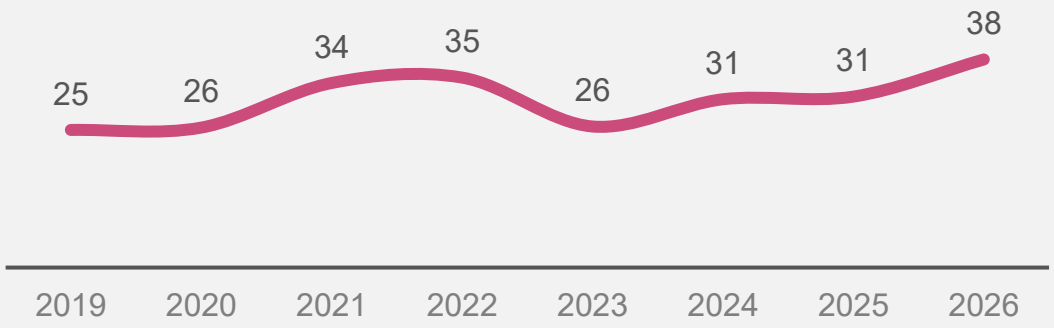
Key values: Pleasure, Sex, Having fun, Excitement
They are self-centered pleasure seekers who aren't too worried about anyone else. As long as they have the money they need to play, they're happy.

Aspirers I What they value

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Aspirers

represent XX% of the population,
↑XX pts from 2019



What Aspirers value

Values that Aspirers rank higher than average:	Rank	Δ from total pop
Adventure	#XX	+XX
Wealth	#XX	+XX
Sex	#XX	+XX
Looking good	#XX	+XX
Self-interest	#XX	+XX
Romance	#XX	+XX
Creativity	#XX	+XX
Faith	#XX	+XX
Traditional gender roles	#XX	+XX
Social recognition	#XX	+XX

What Aspirers don't value

Values that Aspirers rank lower than average:	Rank	Δ from total pop
Internationalism	#XX	-XX
Patriotism	#XX	-XX
Fulfilling work	#XX	-XX
Open-mindedness	#XX	-XX
Modesty	#XX	-XX
Leisure	#XX	-XX
Equality	#XX	-XX
Curiosity	#XX	-XX
Thrift	#XX	-XX
Social tolerance	#XX	-XX
Stable personal relationships	#XX	-XX

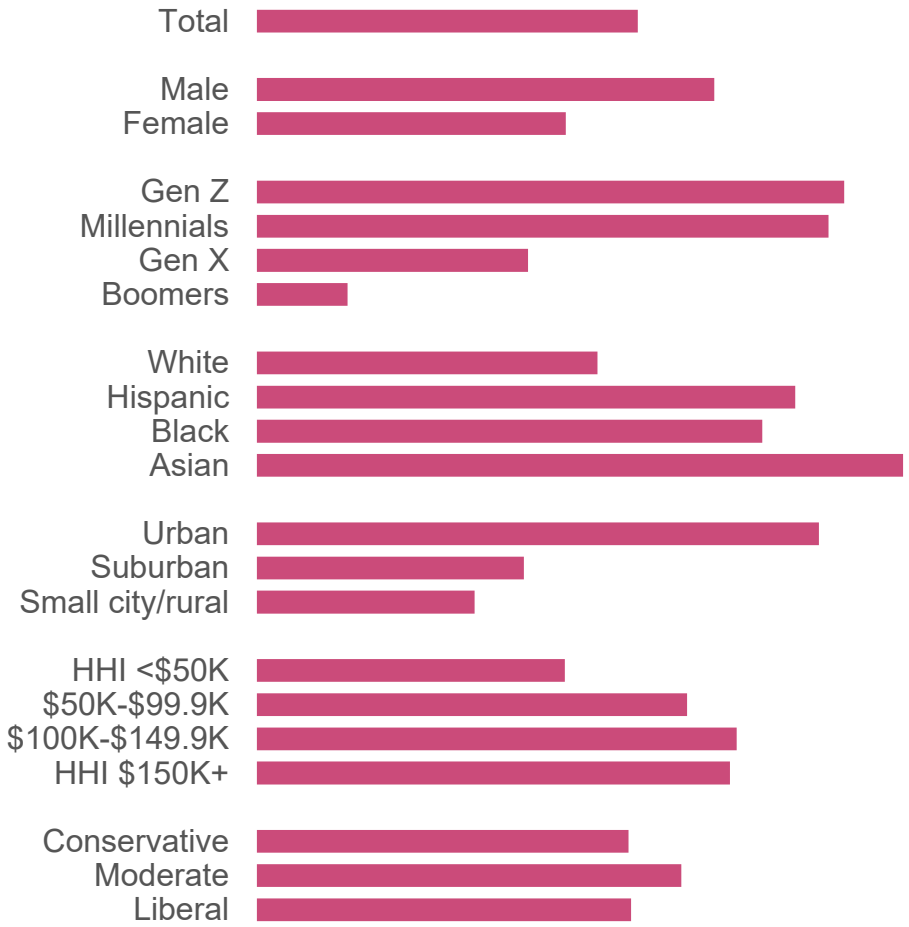
NIQ Consumer Life Global 2026, C1 (USA filter)

Aspirers I Who they are and what matters to them

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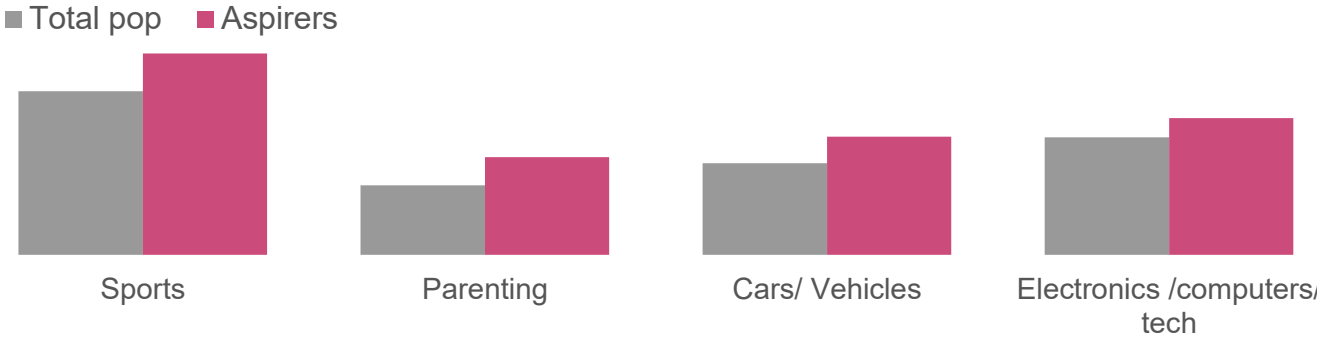
Who Aspirers are

% who are Aspirers



What matters to Aspirers

% very interested in the following
(most differentiating topics, sorted by pt gap from total pop)



Attitudes toward life (rank of statement on a list of 44)	Rank for Aspirers	Δ from total pop
Virtual interactions with people and places can be as good as being there in person	#XX	+XX
I'm always on the lookout for new products and services	#XX	+XX
I feel it is important to be an active part of the wider community	#XX	+XX
I only buy products and services that appeal to my beliefs, values or ideals	#XX	+XX
I will select one brand over another specifically because it supports a cause I believe in	#XX	+XX
It is better to buy well-known brands because you can rely on their quality	#XX	+XX

NIQ Consumer Life Global 2026, C1, A1, EJM1, demos (USA filter)