

RESTORING TRUST: NEW PATHWAYS TO BELIEF

Prosumer Report

HAVAS

2024

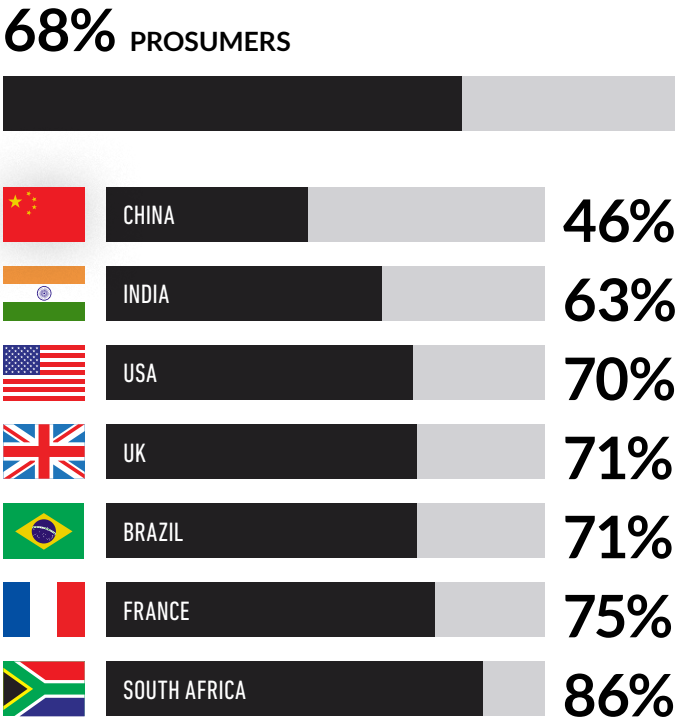




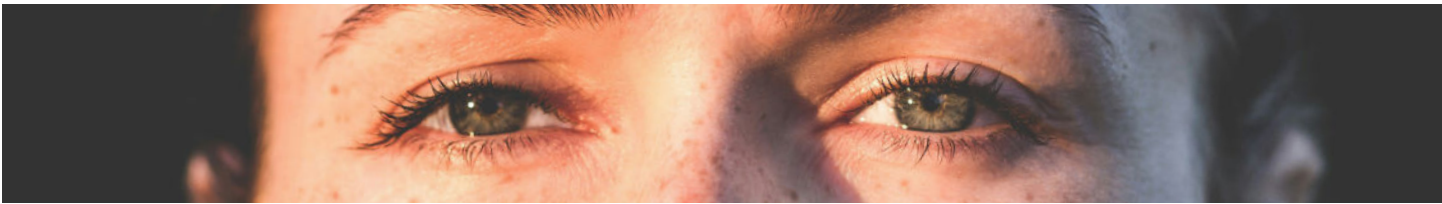
A Trust Deficit

Trust is the adhesive that binds societies, nations, communities, and individuals. Without it, how could we collaborate? Conduct business? Form friendships? Invest? It would be impossible. And so, alarm bells have been ringing globally about what most of us perceive as a loss of trust—in institutions, in governments, and in one another. It's a serious issue given that more than 2 in 3 Prosumers globally worry that people in their country no longer trust one another. In France, that figure rises to 75%, while in South Africa, it's 86%. Only in China is this a minority concern (46%).

I worry that people in my country don't trust each other (Prosumers)



(% agreeing strongly/somewhat)



In our final Prosumer research of 2024, Havas Global surveyed more than 14,000 women and men in 32 markets across Europe, Asia, Africa, and the Americas to better understand the current state of trust and its impact on society—and brands. The good news: Comparing the responses from this study with a similar Prosumer survey we conducted in 2018, we see that people are ready to trust again. In a world filled with misinformation, uncertainty, and discord, our research uncovered a real hunger for the assurance that comes from being able to count on one another. We want to trust again. We need to trust again. This was confirmed by the 86% of Prosumers who agreed that the level of trust among a nation’s citizens is a solid indicator of how well that country is doing. In the absence of trust, we cannot thrive.

A sign that a country is doing great is when people within it trust one another

86% PROSUMERS



76% MAINSTREAM

(% agreeing strongly/somewhat)

TRUST IS FRAGILE...

As the oft-repeated quote goes, “Trust takes years to build, seconds to break, and forever to repair.” That’s a sentiment shared by nearly 9 in 10 Prosumers. Globally, we have quite a bit of ground to make up as we work to turn things around. Around two-thirds of Prosumers—rising to 83% in South Africa—believe that people are less trustworthy than they were a century ago. An even higher proportion (86%) characterizes trust as a rare value.

Trust between people is hard to gain and easy to lose

88% PROSUMERS



88% MAINSTREAM

In general, people are less trustworthy than they were 100 years ago

68% PROSUMERS



66% MAINSTREAM

Trust is a rare value these days

86% PROSUMERS



85% MAINSTREAM

(% agreeing strongly/somewhat)

...AND IT'S A TRAIT WE ARE DESPERATE TO RECOVER

Globally, trust is aspirational. More than 8 in 10 Prosumers perceive the ability to trust as a personal strength, and 79% of them claim that trust is their default mode. They tend to trust people until that trust is betrayed. Significantly, the latter score has increased 13 points since 2018.

I believe being able to trust people around us is a strength

84% PROSUMERS



78% MAINSTREAM



I tend to trust people until they give me a reason not to

PROSUMERS

2018



2024



(% agreeing strongly/somewhat)

Trust is about more than interpersonal relationships, of course. Trust in institutions—legal and financial systems, public health authorities, and more—allows societies to function. And so, it’s worrisome that only 42% of Prosumers and an even bleaker 29% of mainstream consumers trust their governments to bring about positive societal change. That’s on par with their trust in nonprofits and NGOs and well above their trust in businesses and organized religion to do the same.

For positive societal changes, I trust:

Citizens



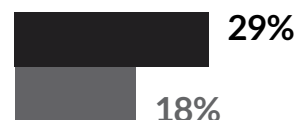
Nonprofits/NGOs/social organizations



My government



Brands and companies



Religious organizations



■ PROSUMERS
■ MAINSTREAM

There is a bright light here, however: We may have lost faith in some of our biggest institutions, but we are holding out hope for “people power.” Most Prosumers (57%) and around half the mainstream say they are relying on their fellow citizens to enact positive change.



How Can We Reclaim Our Ability to Trust?

As a global society, we're deeply concerned about our collective loss of faith in our leaders. In some nations, this loss was intensified during the global pandemic, when misinformation and a lack of clear guidance from elected leaders and public health officials further eroded citizens' already fragile faith in institutions.

I am concerned about society's loss of trusted leaders

77% PROSUMERS



73% MAINSTREAM

And so, we want to get trust back. How do we do that? It will require a combination of reason and emotion.

(% agreeing strongly/somewhat)

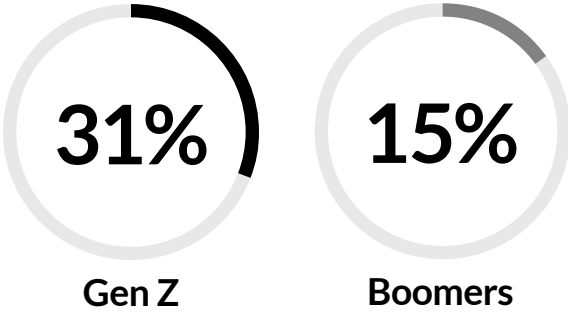


LEFT-BRAIN LOGIC: TRUST IS BUILT ON REASON

The history of humankind has had two abiding—and conflicting—narratives: science versus religion. Across centuries and geographies, the influence of each has waxed and waned, but the conflict persists.

We asked respondents whom they trust more to tell them the truth about the world: their religious community or scientists. Only a quarter of Prosumers expressed greater belief in religious leaders than in scientists. Still, there is a sign of a potential shift: Fully 31% of our youngest respondents, Gen Zs, trust their religious communities more than they do scientists. That’s twice the proportion of baby boomers (15%) who said the same—and an indication that scientists need to get better at communicating with youth.

To tell me the truth about the world, I trust my religious community more than I do scientists

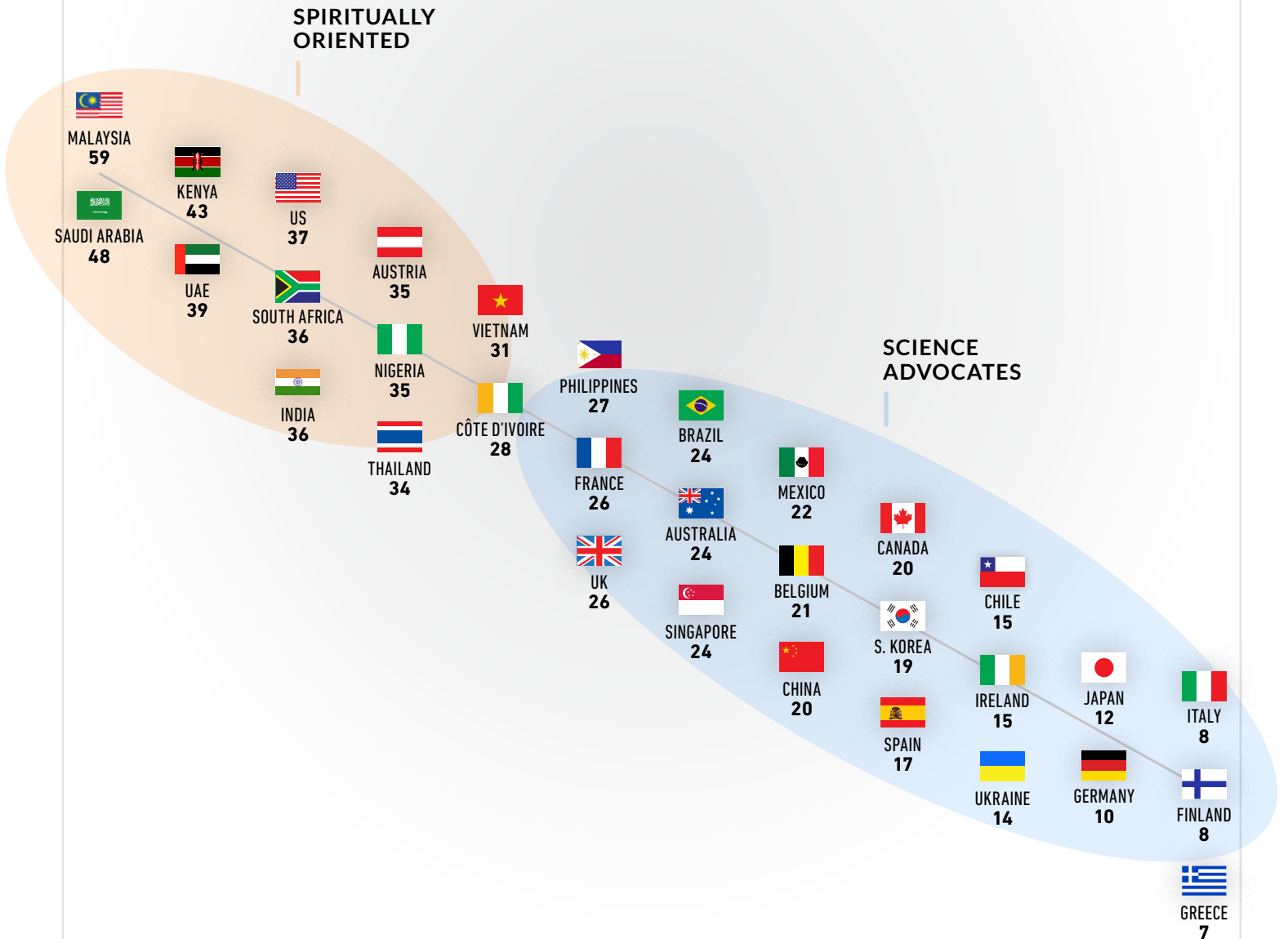


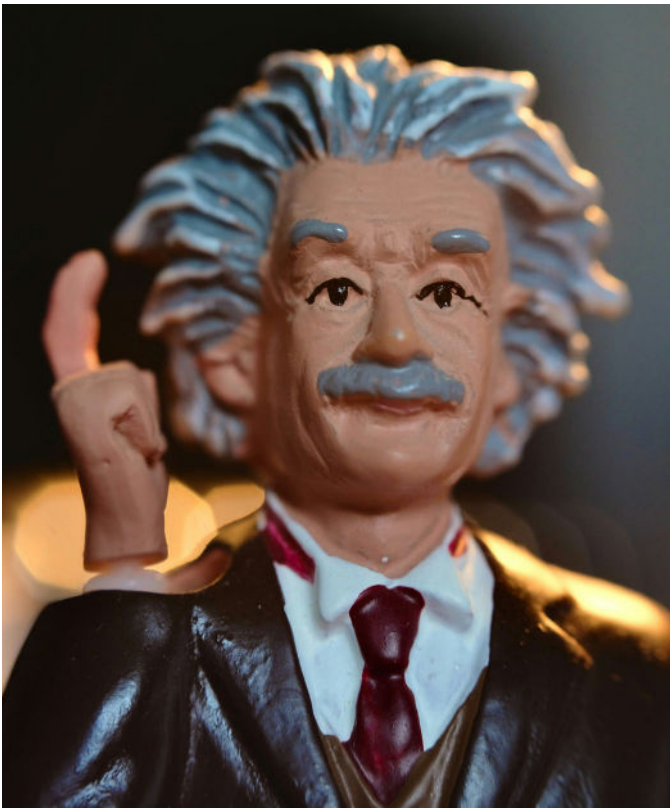
(% agreeing strongly/somewhat)

There is also a wide divergence across the national samples, with just 7% of Greeks relying on their fellow faithful over science compared with 59% of Malaysians who do so. Dividing the 32 markets into two camps—the spiritually oriented and the science-driven—we see that the United States is the only major economic market to fall into the former category.

To tell me the truth about the world, I trust my religious community more than I do scientists

Showing Prosumers by country (% agreeing strongly/somewhat)



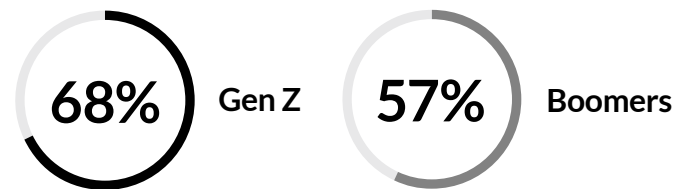


I am more inclined to trust people who are experts

74% PROSUMERS



62% MAINSTREAM

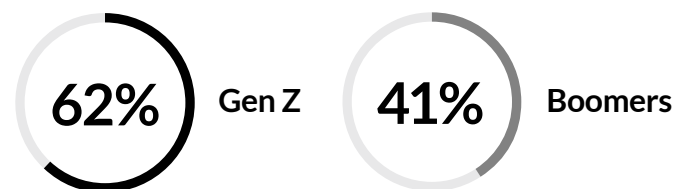


I am more inclined to trust people who are highly educated

66% PROSUMERS



51% MAINSTREAM



The good news for proponents of exceptionalism: Gen Zs scored each of those traits—intelligence, education, and expertise—significantly higher than did their boomer parents and grandparents, suggesting society will trend in that direction.

(% agreeing strongly/somewhat)

PUSHBACK AGAINST ANTI-ELITISM

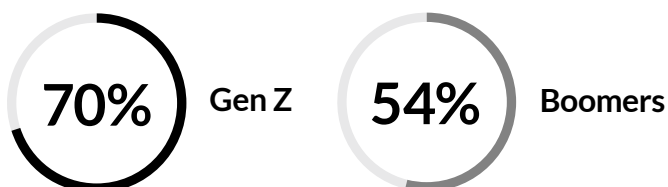
Although the populist movements that have gained strength in many parts of the world this past decade tend to preach an anti-elite and even an anti-higher education message, our respondents underscored the link between trust and brainpower. Put simply, we tend to place more trust in people we consider intelligent, highly educated, or experts in their fields. This tendency is especially prevalent in China and India.

I am more inclined to trust people who are intelligent

75% PROSUMERS



62% MAINSTREAM



(% agreeing strongly/somewhat)



RIGHT-BRAIN LOGIC: TRUST IS BUILT ON EMOTIONAL CONNECTIONS

It makes sense that the more connected we feel to a person, the more apt we are to trust them—not least because we think we have a better shot at anticipating their decisions and behaviors. Our study confirms this, with 56% of Prosumers—rising to 71% in China—indicating they’re more inclined to trust people from their community.

I am more inclined to trust people who come from the same community

56% PROSUMERS



44% MAINSTREAM

I am more inclined to trust people who share my passions

75% PROSUMERS



61% MAINSTREAM

(% agreeing strongly/somewhat)

We’re even more inclined to trust people who share our passions, with Prosumer agreement levels reaching 75% globally and 90% or above in China and India. When people believe in the same things, they are likelier to share a vision of the world and the future they’d like to see. This leads us to ask: Is the loss of trust society is experiencing tied to an overall loss of belief? And if it is, how can we hope to progress if we can’t coalesce around collective beliefs and aspirations?

SHARED BELIEFS HELP US MAKE SENSE OF THE WORLD...

The future is increasingly uncertain, according to more than 7 in 10 Prosumers, making it more difficult to envision what’s next. That’s a scary position to be in.

I believe the future is more and more uncertain

71% PROSUMERS



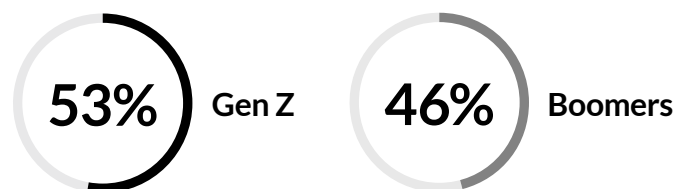
72% MAINSTREAM

It has become harder for me to project myself into the future

44% PROSUMERS



51% MAINSTREAM



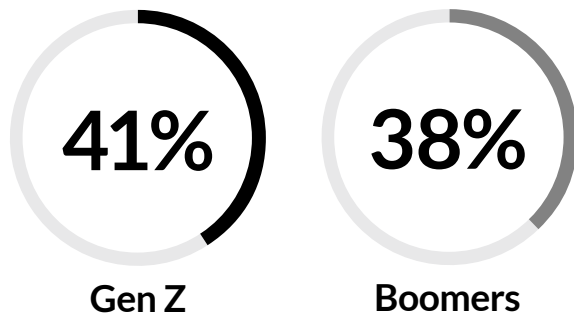
(% agreeing strongly/somewhat)

...BUT MORE OF US ARE CREATING OUR OWN TRUTHS

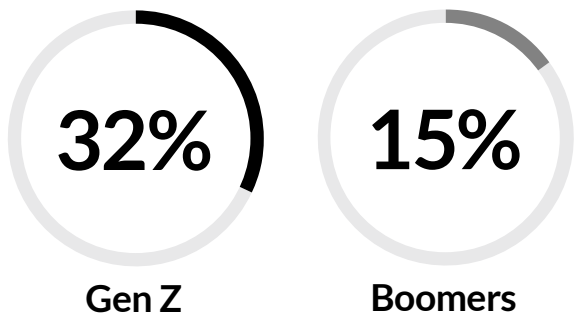
Even more troubling: In an era of “alternative facts,” the very existence of truth is being called into question. Nearly 4 in 10 Prosumers (37%) and 41% of Gen Zs think there is no such thing as an undeniable truth. Think about that for a moment. Black and white has given way to endless shades of gray.

Moreover, more than a quarter of Prosumers and nearly one-third of Gen Zs consider so-called conspiracy theories essential to their understanding of the world. Whereas the term used to be associated with crackpots and the radical fringes, sizeable proportions of populations globally now incorporate such theories into their worldviews. This is part of a broader trend in which people value narratives over facts.

I think undeniable truth doesn't exist anymore



Conspiracy theories are often the only way to understand the world

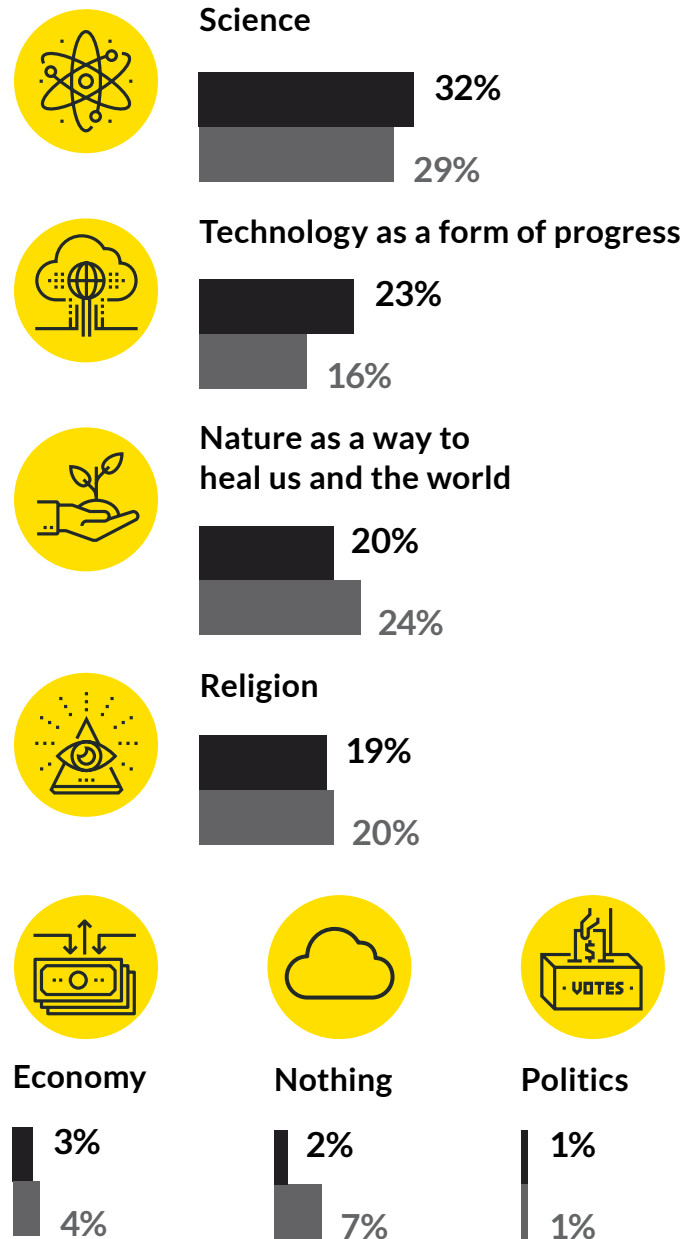


(% agreeing strongly/somewhat)

CAN WE COME TOGETHER AROUND CORE BELIEFS?

Shared beliefs are a cornerstone of trust, and so we chose to explore participants' belief systems. Their responses allowed us to divide them into three broad categories: Progress Architects (believers in science and technology), Earth's Guardians (believers in the healing power of nature), and Spiritual Navigators (believers in religion). Each belief system influences the communities with which people surround themselves.

What do you most believe in? (Choose one.)



■ PROSUMERS ■ MAINSTREAM



PROGRESS ARCHITECTS

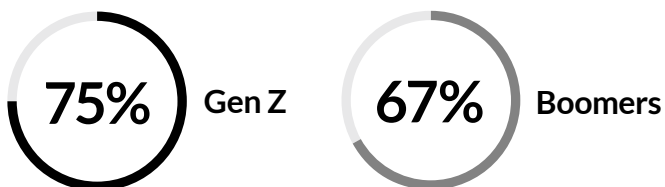
Despite widespread concern over the negative impacts of social media and AI, 86% of Prosumers and 70% of the mainstream strongly believe technology is ushering in progress. And almost as many people still believe that science is the best instrument for making sense of the world. Both of these sentiments are more prevalent among Gen Zs.

I strongly believe technology is bringing progress to humanity

86% PROSUMERS



71% MAINSTREAM

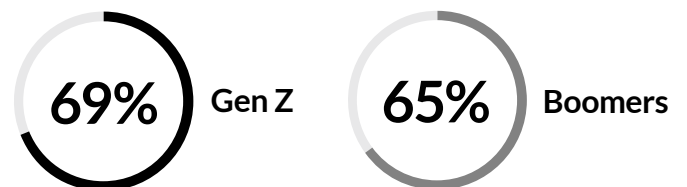


I believe that science is the best way to help us make sense of the world

79% PROSUMERS



67% MAINSTREAM



(% agreeing strongly/somewhat)



EARTH'S GUARDIANS

More than two-thirds of Prosumers—rising to over 80% in China, India, and South Africa—believe in the miraculous healing power of nature. And 1 in 5 Prosumers—rising to 43% in France—believe nature can heal humans and the world.

I believe in the miraculous healing power of nature

69% PROSUMERS



60% MAINSTREAM

(% agreeing strongly/somewhat)

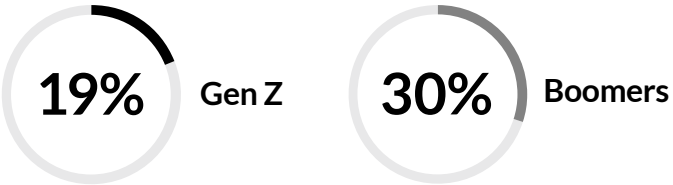


I believe nature is a way to heal us and the world

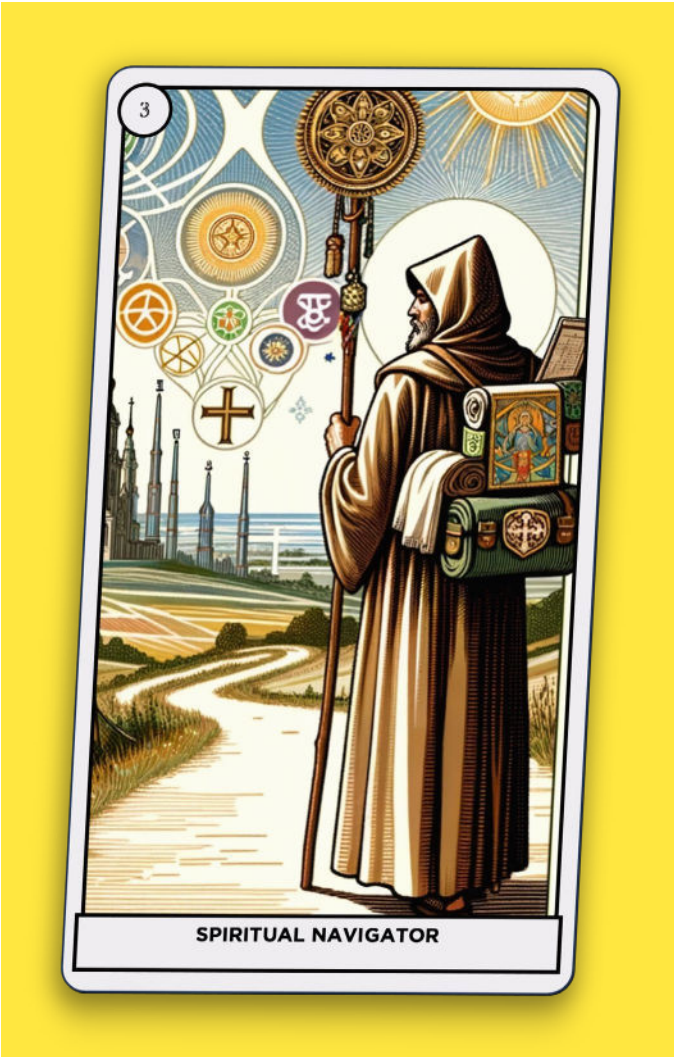
20% PROSUMERS



24% MAINSTREAM



Tellingly, the digital native Gen Zs are only around half as likely as older respondents to have faith in the healing power of nature. This likely speaks both to their concerns over climate change and their more limited exposure to the great outdoors.



SPIRITUAL NAVIGATORS

One of the perks of religious faith is the ability to trust in a divine plan. And so we see that a slight majority of Prosumers say their religious faith helps them envision the future. This statement saw sharp divisions between countries, with agreement levels ranging from just 15% in China to 81% in South Africa.

Interestingly, 54% of Gen Zs agree with the statement compared with just 37% of boomers. We also see this generational divide on the question of whether believing in a form of transcendence helps respondents make sense of the world. Half of Prosumers and 46% of Gen Zs said yes versus just 37% of the mainstream and 26% of boomers.

This speaks to the birth of a new generation of believers who consider themselves spiritual rather than religious.

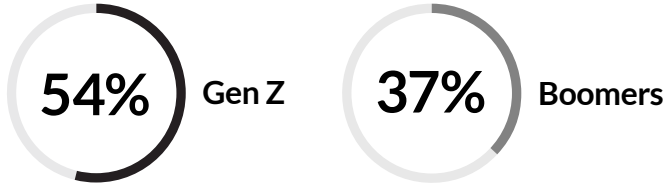


Believing in God helps me to project myself into the future

52% PROSUMERS



46% MAINSTREAM



(% agreeing strongly/somewhat)

Believing in a form of transcendence helps me make sense of the world

51% PROSUMERS



37% MAINSTREAM



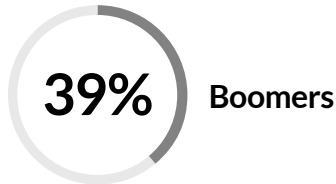
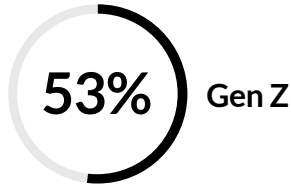
SMELLS LIKE GEN Z SPIRIT(UALITY)

Digging deeper into this generational divide, we asked respondents whether they believe in several basic tenets of religion and spirituality. In every instance, Gen Zs returned significantly higher agreement levels than boomers. In an era when people are losing faith in institutions and one another, the younger generation is showing interest in rekindling ancient belief systems, from **paganism** to **astrology**.

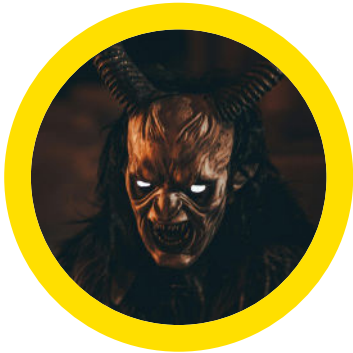
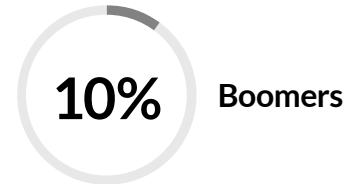
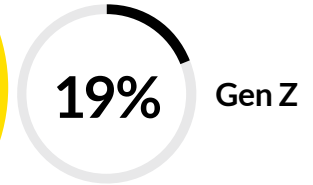
I believe the following ideas to be true:



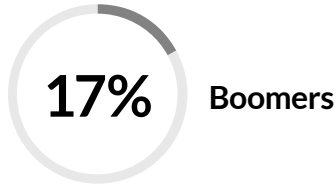
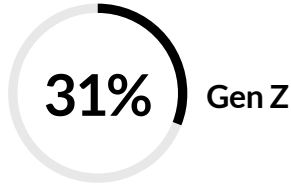
Miracles happen



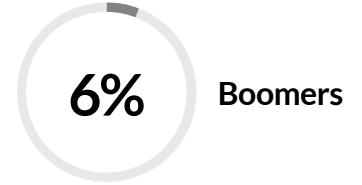
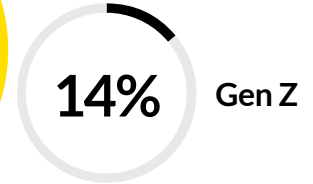
The horoscope reflects our personality



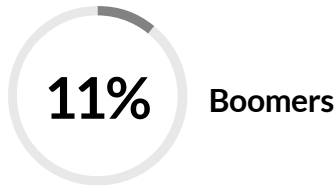
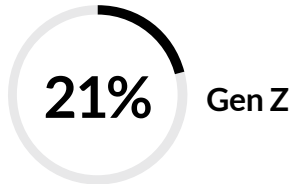
The devil is real



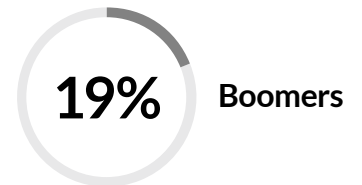
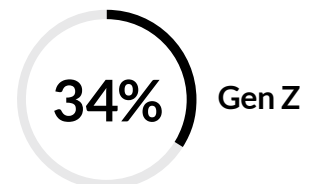
Astrology can really predict my future



Magic really exists



I think it's a good thing that our society comes back to ancient forms of wisdom (e.g., astrology, witchcraft)



(% agreeing strongly/somewhat)

AN ALTERNATIVE REALITY: CHOOSING NOT TO BELIEVE

Recent years have seen an uptick in discussions about two nonscientific theories: that the earth is flat and extraterrestrials live among us. Though the flat-earthers represent a tiny sliver of the population (5%), around a quarter of Prosumers in the US and India are convinced ETs have already landed and presumably are intermingled with the human species. (This may go some way toward explaining the past decade...) Nike has entered the conversation with a **new logo** designed for US basketball phenom Victor Wembanyama. It features an alien, sometimes centered in a crop circle.



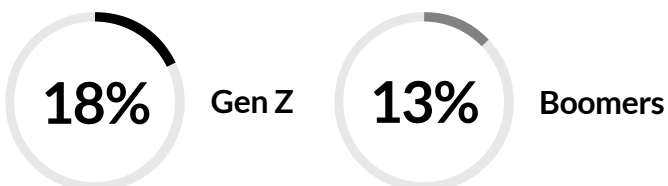
I believe the following ideas to be true:

Aliens are on Earth

18% PROSUMERS



16% MAINSTREAM



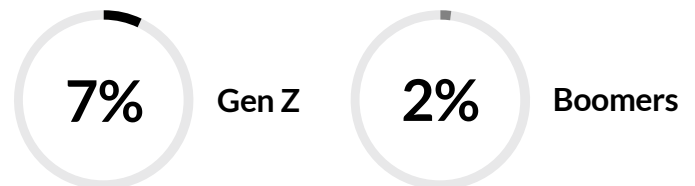
I believe the following ideas to be true:

The Earth is flat

6% PROSUMERS



5% MAINSTREAM





The fact that some among us adhere to fringe beliefs speaks to an interesting dichotomy: While 63% of Prosumers worry that too many of their fellow citizens buy into conspiracy theories, around as many (61%) are convinced that governments actively manipulate information to serve their interests. It stands to reason, therefore, that most people now question “official” narratives.

If we don't trust public authorities to tell the truth, how can we be certain what is real and what is fabricated?

I'm afraid too many people nowadays believe in conspiracy theories

63% PROSUMERS



62% MAINSTREAM

(% agreeing strongly/somewhat)

I am convinced that governments actively manipulate information to serve their interests

61% PROSUMERS



61% MAINSTREAM

IS DISBELIEF THE LAST REFUGE FROM MISINFORMATION?

Some might consider it safest to opt out of beliefs that can't be rationally explained. And so we see that around a quarter of Gen Zs and half of boomers don't believe in any of the unscientifically substantiated beliefs we presented, whether regarding miracles and magic, devils and aliens, or horoscopes and astrology.

(% agreeing strongly/somewhat)



Can We Trust in Brands?

In this century, brands are tightly interwoven across our lives, and so it's important we trust them. Do we? The fact that the English lexicon now includes terms such as **causewashing**, **greenwashing**, and **pinkwashing** to refer to brands' corporate social responsibility campaigns points to the skepticism many consumers feel. And sure enough, most Prosumers and mainstream consumers believe brands' trust-building exercises are insincere attempts to boost profits. On the upside, the Prosumer score is four points lower than in our 2018 exploration of trust.



SCIENCE AND RATIONALITY STILL WORK

Consumers want to see brand claims backed by facts. More than 8 in 10 Prosumers—rising to 99% in China—told us that the more a brand demonstrates its effectiveness through science, the more they trust it. Empirical evidence matters.

For more than 30 years, Blendtec founder Tom Dickson demonstrated the power of his blenders by posting “**Will It Blend?**” videos showing the product chewing up everything from iPhones to plastic skeletons and the Elsa Barbie Doll.

In a famous product efficacy test in the 1970s, Memorex recruited jazz singer Ella Fitzgerald to sing a note sufficiently high to shatter a glass (when amplified). It then showed the **same result** when the sound was reproduced on one of its cassette tapes made with MRX2 Oxide. Tagline: “Is it live...or is it Memorex?”

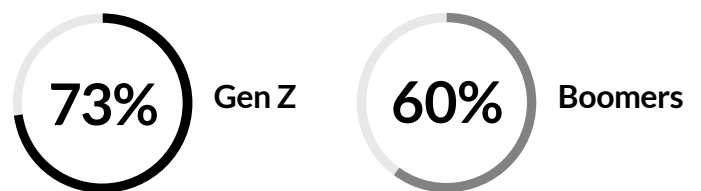
This summer, Eucerin hosted **pop-ups** staffed by dermatologists to explain the science behind its Immersive Hydration product line.

The more a brand demonstrates its effectiveness scientifically, the more I trust it

82% PROSUMERS



66% MAINSTREAM



(% agreeing strongly/somewhat)

Brands that try to gain people’s trust are not being sincere; they are only trying to boost their profits

53% PROSUMERS



57% MAINSTREAM

(% agreeing strongly/somewhat)

So, how can brands prove themselves worthy of trust?

At one extreme is the **Red Cross charity shop** in Copenhagen that lets customers download an app for use when the shop is closed. Customers enter using a QR code, choose what they want, and leave money on the counter. How better to build trust than to give it?

That approach may be feasible in Demark, a country known as “**the land of trust.**” Elsewhere? People want external verification.



IN THIRD PARTIES, WE TRUST

Around two-thirds of Prosumers are more trusting of brands that use labels and scores. These typically are third-party endorsements signifying that a product qualifies as organic, fair trade, pasture-raised, sustainably produced, or something of that ilk. What's essential is that the validation comes from an organization that is, in itself, trusted.

I tend to place more trust in brands when they use labels and scores

65% PROSUMERS

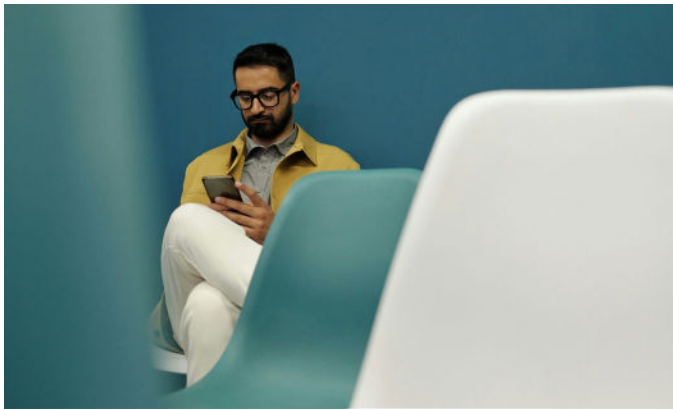


45% MAINSTREAM

(% agreeing strongly/somewhat)

U.K.-based **BELU**, a social enterprise selling mineral water and filtration systems, has its sustainability claims verified by the nonprofit **Provenance** to ensure they're accurate and unambiguous. Their website displays proof points to back up every claim.

Used widely in Europe, the **Nutri-Score** and **Eco-Score** use a five-color scale from green (A) to red (E) to indicate a product's overall nutritional value or environmental impact, respectively, helping consumers make healthier choices for themselves or the planet at a glance.



STAND DOWN, EMPLOYEES

In 2018, employees were in the spotlight. In our survey that year, 60% of global Prosumers indicated that employees were their most trusted source of information about a company, while 67% said how a company treats its employees is the most significant factor in whether they trust the brand. By 2024, although employees were still the most trusted source of company information, these scores had plummeted to 33% and 42%, respectively.

PREPARE FOR FACT-CHECKING

With access to the internet, most Prosumers and mainstream consumers prefer to verify brand claims. YouTubers such as the intrepid product tester [@FieldofFocus](#) are there to help.

Social media darling [Yuka](#) is an app that lets consumers scan barcodes on their food and personal care products to receive ingredients-based scores, detailed explanations, and alternative product suggestions when the scores are low.

I don't really believe in what brands claim nowadays; I prefer to verify everything on the internet

57% PROSUMERS



51% MAINSTREAM

(% agreeing strongly/somewhat)

Which of these attributes/characteristics make you more likely to trust a company/brand?

It is transparent and allows me to easily check the quality and provenance of its products

44% PROSUMERS



44% MAINSTREAM

Whom do you trust most to honestly tell you how a company operates?

(showing Prosumers)



Which of these attributes/characteristics make you more likely to trust a company/brand:

It treats its employees well

34% PROSUMERS



37% MAINSTREAM

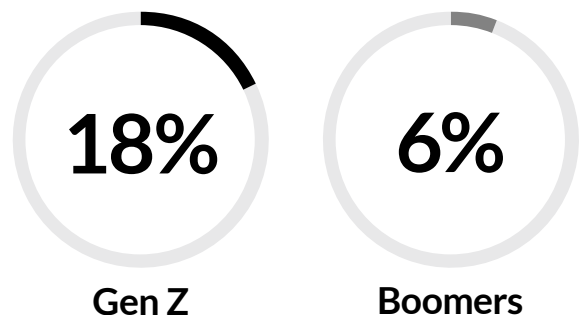
What accounts for this outsized drop? It may be that brands showcasing their employees was overused to the point that the approach lost its power or set eyes rolling. There's also the fact that people have more information sources today to judge what a brand is all about.



ARE CEOS MAKING A COMEBACK?

In a world in crisis, we're looking for leaders who deliver solutions. Sometimes, those come in the form of high-profile CEOs. In our 2024 survey, 17% of Prosumers indicated that CEOs are their most trusted sources of information about a company. That's significant because it's five points higher than in 2018. There's also a clear generational skew, with 18% of Gen Zs versus just 6% of boomers agreeing with the statement. Corporate leaders may want to brush up on their media training.

Whom do you trust most to honestly tell you how a company operates: **Its CEO or leader**



(% agreeing strongly/somewhat)

HAVE OUR WATCHDOGS BEEN DEFANGED?

Perhaps the clearest indicator of society's loss of trust in nongovernmental institutions is that fewer than 1 in 5 Prosumers chose nonprofits or independent journalists as their most relied-on source of accurate information about a company. This correlates with [reports](#) showing declining trust in media worldwide.



IN A NUTSHELL

1. Trust is essential for a healthy society—and its increasing absence is sparking alarm.

2. People are hungry to trust—in information, in authorities and institutions, and in one another—to tame the chaos that threatens to engulf us.

3. Despite the movement toward populism, people rely on those they deem intelligent, educated, and experts in their fields. Still, they also are more likely to trust people “like them,” including members of their most valued communities.

4. To dream about the future requires trust in other people and a shared sense of reality. The fraying of our social fabric makes it more difficult for potential solutions to gain consensus—or traction.

5. Three types of citizens are emerging: **Progress Architects**—most prevalent in technophile countries such as China and India—believe technology can advance humanity and solve our most pressing challenges. **Earth’s Guardians** wish to reconnect with nature to find meaning in their lives and preserve their mental health. **Spiritual Navigators** combine various beliefs—from religious tenets to conspiracy theories—to understand the world.

6. Businesses and brands must focus on scientific data and real-world evidence to support their claims.

7. CEOs are regaining ground, especially when they can convey a clear vision and path to get there.

About the Study

In the first quarter of 2024, Havas partnered with Market Probe International to survey 14,355 people ages 18+ in 32 markets: Africa Bundle (Ivory Coast, Kenya, Nigeria), Australia, Austria, Belgium, Brazil, China, Canada, Chile, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Korea, Malaysia, Mexico, Philippines, Saudi Arabia, Singapore, South Africa, Spain, Thailand, Ukraine, United States, United Kingdom, United Arab Emirates, and Vietnam.

The survey sample was made up of **19%** leading-edge **Prosumers**



and **81%** mainstream consumers.

Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

Find out more about Prosumer Reports



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