

**HAVAS** Media  
Network



# 2024 Society Says

Consumer perspectives on culture and  
media in an ever-increasing personal  
world

June 2024

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## Key Takeaways



**"Culture drives  
expectations and beliefs.**

**Expectations and beliefs drive behaviours.  
Behaviours drive habits and habits create the future."**

**JON GORDON**

# The world changed in 2020

2020 Omnibus study to better understand consumers  
expectations of media amid turbulent times



**ATTITUDES TOWARDS MEANINGFUL MEDIA**  
A GLOBAL REPORT

13<sup>th</sup> November 2020  
Wave 1



# Trust, transparency and social impact for media rose in importance

**01**

Consumers expect media publishers to **support social issues**

**02**

People are more likely to consume media from **values-driven publishers**

**03**

**Fact checked and verified content** from publishers is a must

**04**

Advertisers have a responsibility to act with **social impact** in mind

**05**

**Good use of data** by advertisers is top concern for consumers

**06**

TV remains the most **meaningful and preferred** media channel

# Support for the greater good became a growing trend



# 73%

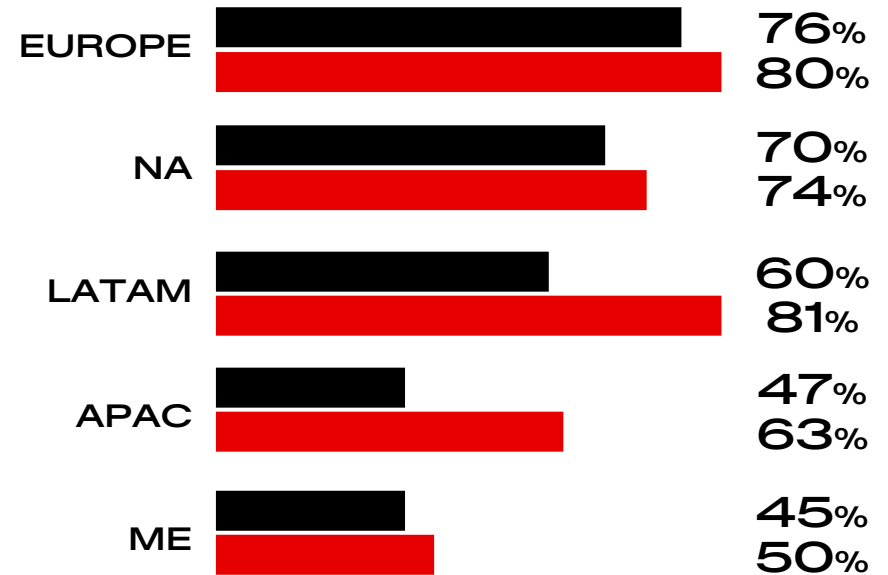
brands must act now for the good of society and the planet\*



# In 2023, people still felt the effects of the unstable backdrop in their daily lives



## GLOBALLY






The world is going in the wrong direction, at a global level  
 We are living in an environmental crisis, at a global level

## PERSONALLY

- #1** We are living in an economic crisis, at a personal level
- #2** Health crisis
- #3** Societal crisis
- #4** Environmental crisis
- #5** Political crisis

# However, there was a shift in priorities: consumers wanted brands to deliver more for them personally

	 FUNCTIONAL	 PERSONAL	 COLLECTIVE
Average contribution to meaningfulness	33%	33%	33%
Contribution to meaningfulness in the "Me-economy"	32%	36%	32%

**+57%**

Brands that deliver on PERSONAL benefits score better than the average brand



# In 2024, how does this SHIFT TO FOCUS ON SELF manifest itself?





# The changing impact that the unpredictable cultural backdrop

has had on people's priorities, expectations, and media consumption since the global pandemic, coupled with the recent shift in demand for more focus on tangible, personal benefits, got us curious on how this manifests in 2024.

## We wanted to know:

01

### Societal Themes

How does the shift for a desire to focus on more personal benefits manifest across current societal topics?

02

### Media Channels

How do media channels deliver against the personal benefits people seek and what channels are considered most meaningful?

03

### Advertiser and Publisher Responsibility

What matters most to people when it comes to media?

# Methodology

## METHOD

Quantitative 15-minute online survey conducted between 03/27/24 and 04/10/24 by Havas' global third-party panel partner leveraging their 1st party panel across 6 markets with 1000+ interviews per market.

## TARGET AUDIENCE

Full representation of society – respondents aged 18 – 65+.  
Balanced representation across gender and generations.

### COUNTRY



### SAMPLE SIZE

**1014**

**2051\***

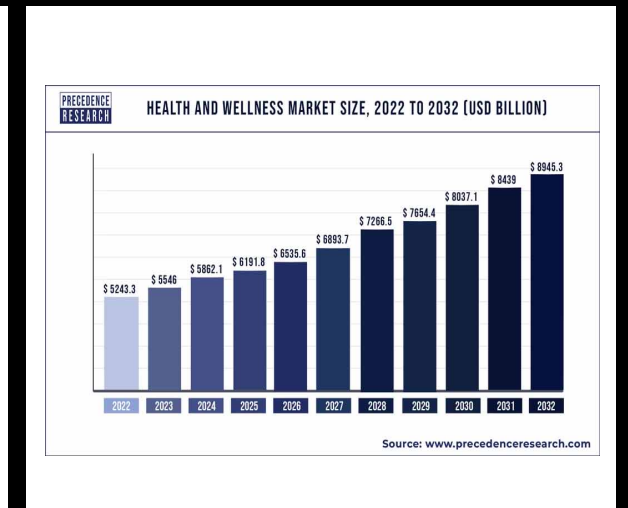
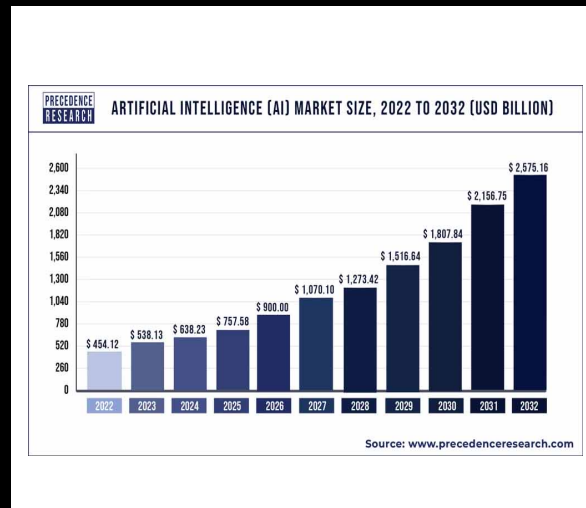
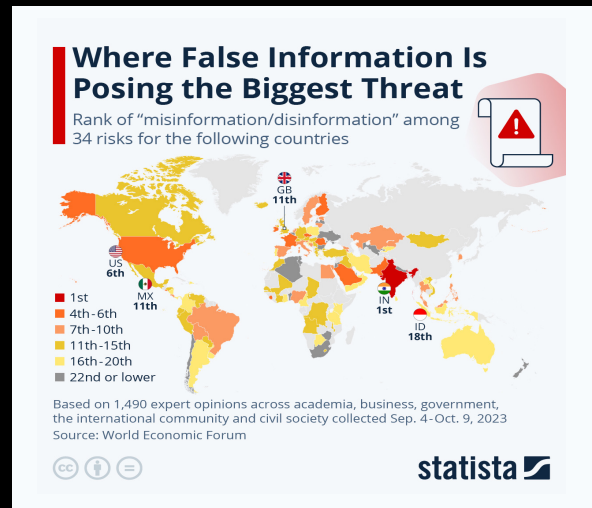
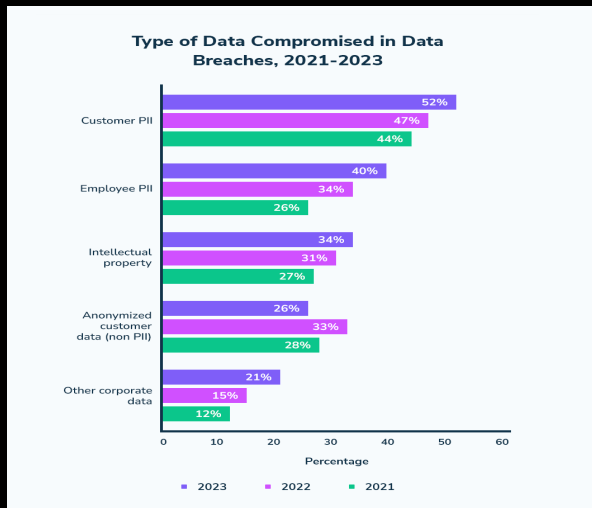
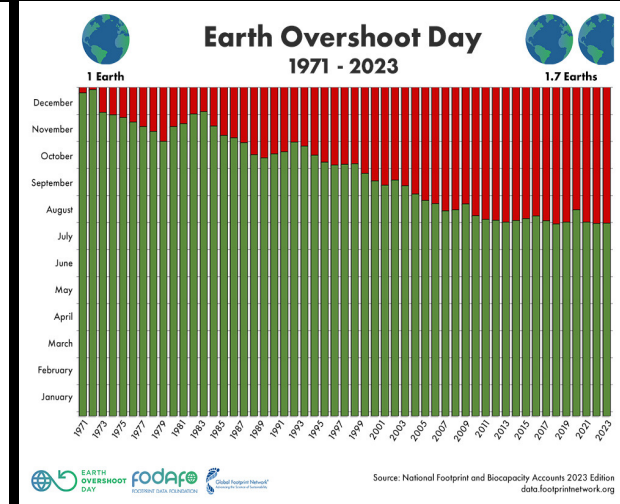
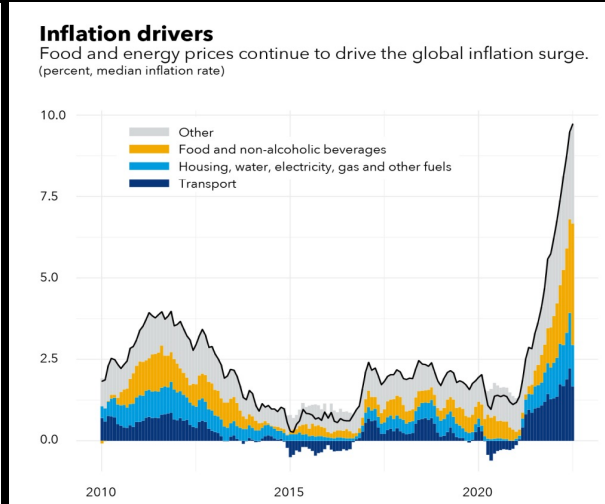
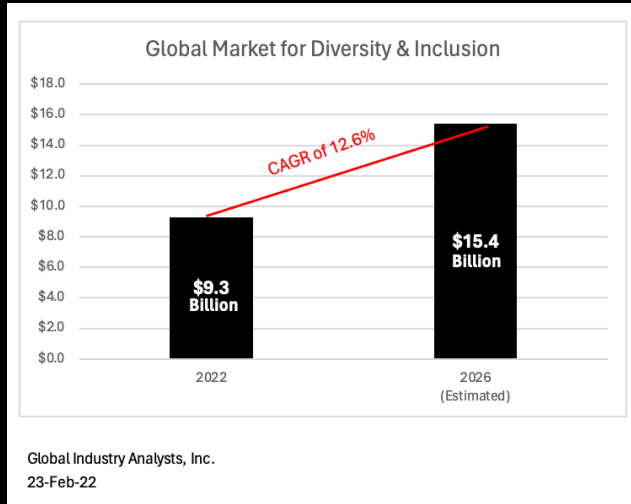
**1034**

**1011**

**1010**

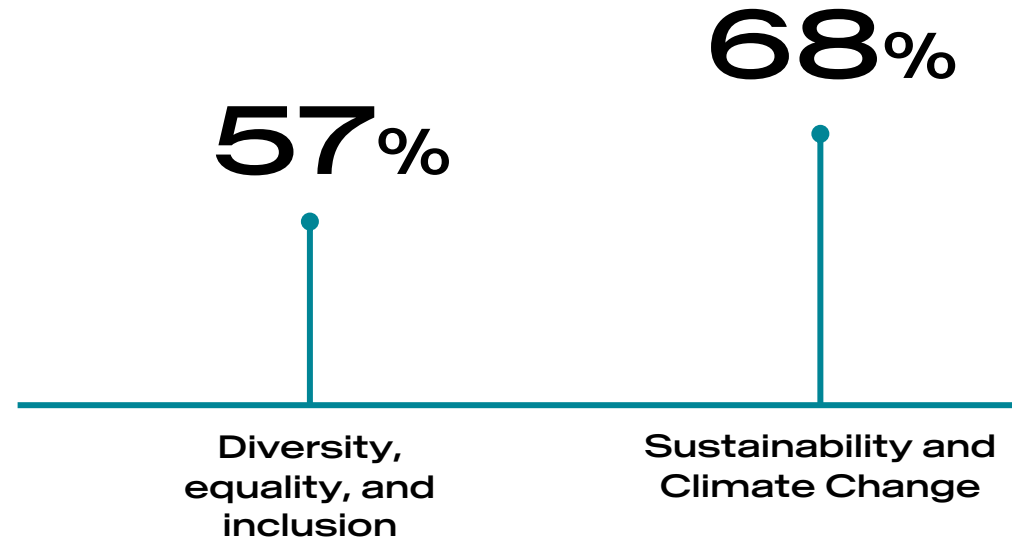
**1042**

# The world in 2024: familiar cultural themes persist, some have intensified



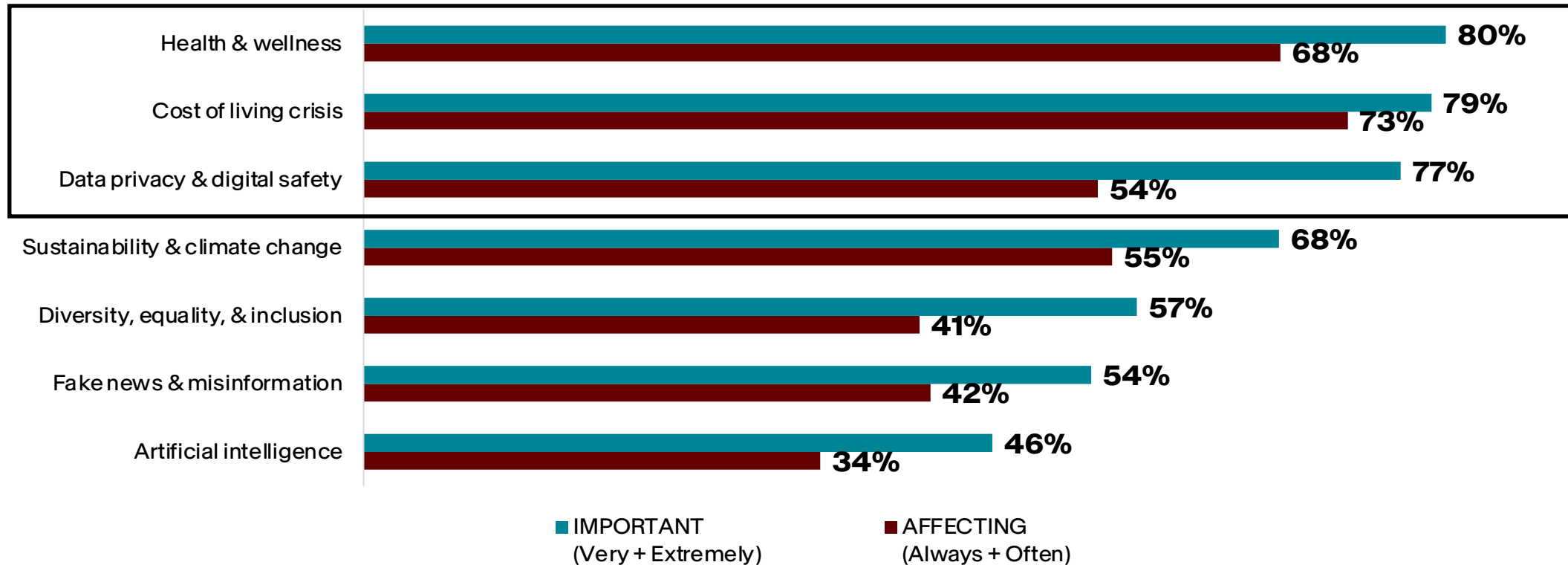
Emphasis placed on **people and planet** continues

PREFERENCE:  
TWO OPPOSING VIEWS



# However, societal issues that directly impact citizens on a **personal level take precedence**

How Important are the following societal topics and how often do they affect your day-to-day life?



# Health & Wellness

Society leans towards authentic and natural depiction in a grounded world



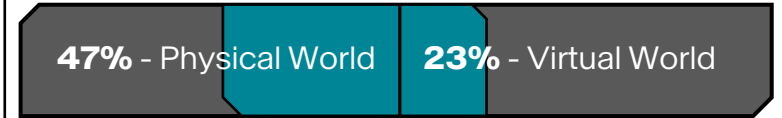
18-24	14%	53%
25-34	13%	55%
35-44	12%	54%
45-54	12%	51%
55-64	14%	47%
65+	14%	47%

France	11%	52%
Germany	11%	57%
India	13%	63%
Mexico	14%	48%
Spain	14%	43%
USA	17%	45%



18-24	29%	34%
25-34	28%	34%
35-44	27%	35%
45-54	30%	29%
55-64	28%	27%
65+	29%	26%

France	17%	48%
Germany	31%	20%
India	29%	40%
Mexico	34%	25%
Spain	30%	23%
USA	30%	30%



18-24	37%	33%
25-34	38%	33%
35-44	40%	30%
45-54	48%	21%
55-64	59%	13%
65+	60%	10%

France	54%	19%
Germany	52%	15%
India	35%	41%
Mexico	39%	27%
Spain	48%	18%
USA	53%	21%

Zoom in

# Cost of Living Crisis

Society prefers future stability with owned assets, but will not sacrifice quality



**20%** - Live in the moment

**42%** - Plan for the future

18-24	21%	42%
25-34	18%	47%
35-44	19%	45%
45-54	21%	42%
55-64	23%	36%
65+	22%	38%

France	20%	41%
Germany	26%	31%
India	17%	54%
Mexico	19%	48%
Spain	24%	32%
USA	16%	44%



**16%** - Low Cost

**49%** - Quality

18-24	13%	51%
25-34	14%	56%
35-44	14%	53%
45-54	16%	49%
55-64	18%	43%
65+	22%	44%

France	20%	42%
Germany	22%	34%
India	7%	70%
Mexico	14%	57%
Spain	13%	47%
USA	20%	46%



**44%** - Owning

**27%** - Renting/ Sharing

18-24	40%	32%
25-34	39%	34%
35-44	42%	31%
45-54	45%	25%
55-64	49%	19%
65+	49%	17%

France	40%	23%
Germany	46%	20%
India	34%	43%
Mexico	46%	29%
Spain	48%	21%
USA	49%	23%



Zoom in

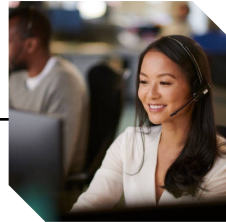
SOCIETAL THEMES

MEDIA CHANNELS

ADVERTISER & PUBLISHER RESPONSIBILITY

# Data Privacy & Digital Safety

Society leans towards privacy and is still warming up to AI



49% - Human Touch

24% - Artificial Intelligence

48% - Data Privacy

27% - Value Exchange (personalization)

18-24	38%	34%
25-34	39%	33%
35-44	41%	30%
45-54	52%	23%
55-64	62%	13%
65+	64%	12%

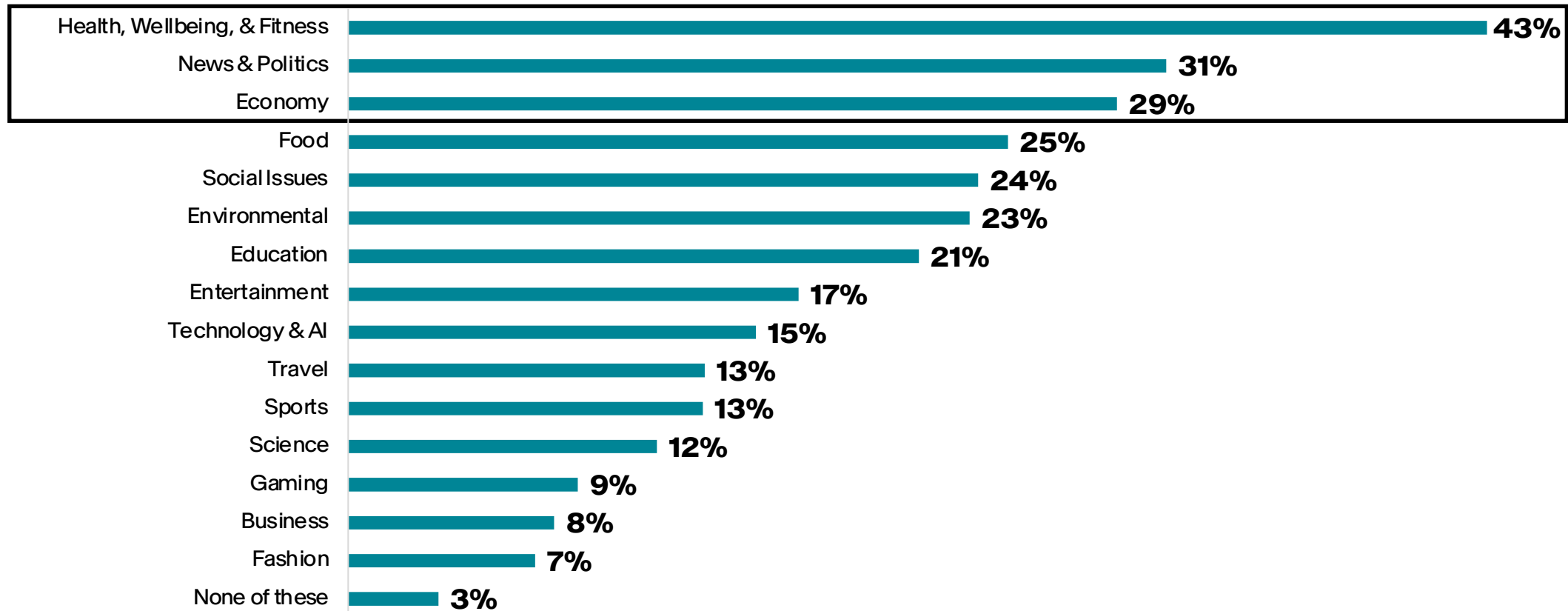
18-24	40%	35%
25-34	43%	33%
35-44	42%	32%
45-54	50%	25%
55-64	57%	20%
65+	57%	20%

France	50%	21%
Germany	63%	14%
India	31%	44%
Mexico	45%	26%
Spain	54%	18%
USA	53%	21%

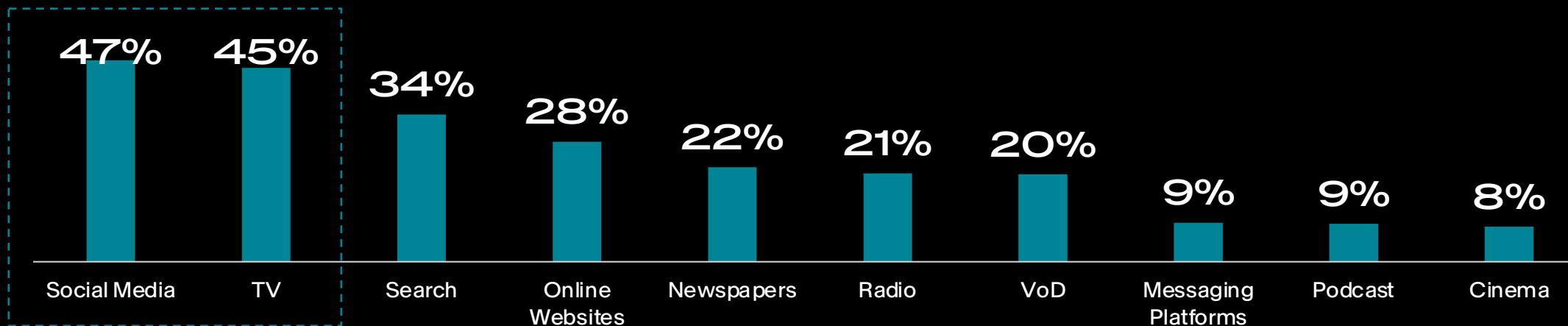
France	46%	25%
Germany	51%	18%
India	38%	44%
Mexico	50%	28%
Spain	51%	24%
USA	53%	25%

# Topics that people keep up with the most such as **news**, **health**, and the **economy** are also driven by what **personally impacts their daily lives**

Which of the following topics do you tend to keep up with / engage with the most?



# Even the media channels ranked most meaningful deliver the most personal benefits



Top 3 channels delivering on the following PERSONAL benefits:

	Simplifies	Connects	Happiness	Self Expression	Escape	New Ideas
#1	Search	Social Media	Social Media	Social Media	Social Media	Social Media
#2	Social Media	Messaging Platforms	TV	None	TV	Search
#3	Online Websites	Other Mobile Apps	None	Messaging Platforms	Video on Demand	Online Websites

Top 3 channels delivering on meaningful content:

Entertain	Educational	Informs	Engaging
TV	Search	TV	Social Media
Social Media	Online Websites	Social Media	TV
Video on Demand	Social Media	Newspaper	None

Zoom in

# Media Channel Delivery

Social media scored especially high overall for the younger generations

Top media channels delivering on the following personal benefits and meaningful content:

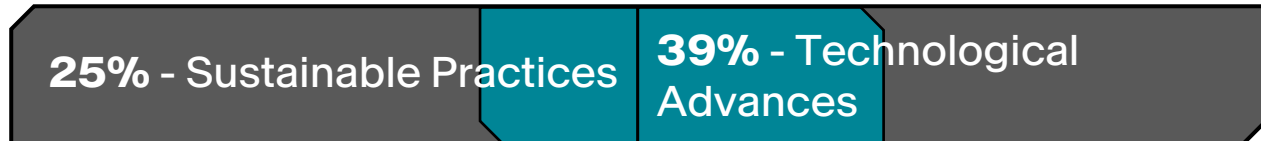
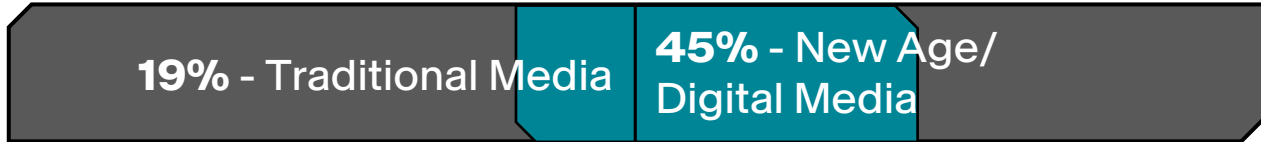
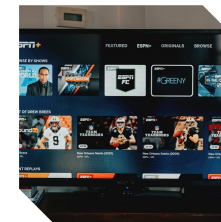
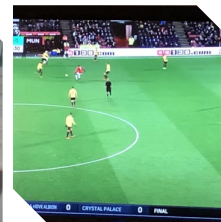
	First Position					
	18-24	25-34	35-44	45-54	55-64	65+
Simplify	Social Media	Social Media	Social Media	Search	Search	Search
Connecting	Social Media	Social Media	Social Media	Social Media	Social Media	Social Media
Happiness	Social Media	Social Media	Social Media	Social Media	None	None
Self Expression	Social Media	Social Media	Social Media	Social Media	Social Media	None
Escape	Social Media	Social Media	Social Media	Social Media	TV	TV
New Ideas	Social Media	Social Media	Social Media	Social Media	Search	Online Websites

Entertain	Social Media	Social Media	Social Media	TV	TV	TV
Educational	Search	Search	Search	Search	Search	Search
Informs	Social Media	Social Media	Social Media	TV	TV	TV
Engaging Advertising	Social Media	Social Media	Social Media	Social Media	TV	None

	Second Position					
	18-24	25-34	35-44	45-54	55-64	65+
	Search	Search	Search	Social Media	Online Websites	None
	Messaging Platforms	Messaging Platforms	Messaging Platforms	Messaging Platforms	Messaging Platforms	Messaging Platforms
	VoD	VoD	VoD	VoD	TV	TV
	Messaging Platforms	None	None	None	None	Social Media
	VoD	VoD	VoD	TV	VoD	Social Media
	Search	Search	Search	Search	Social Media	Search

	VoD	VoD	VoD	Social Media	VoD	Social Media
	Social Media	Online Websites	Online Websites	Online Websites	Online Websites	Online Websites
	TV	TV	TV	Social Media	Radio	Radio
	TV	TV	TV	TV	None	TV

### PREFERENCE: TWO OPPOSING VIEWS



In general, people prefer a digital, future-leaning society

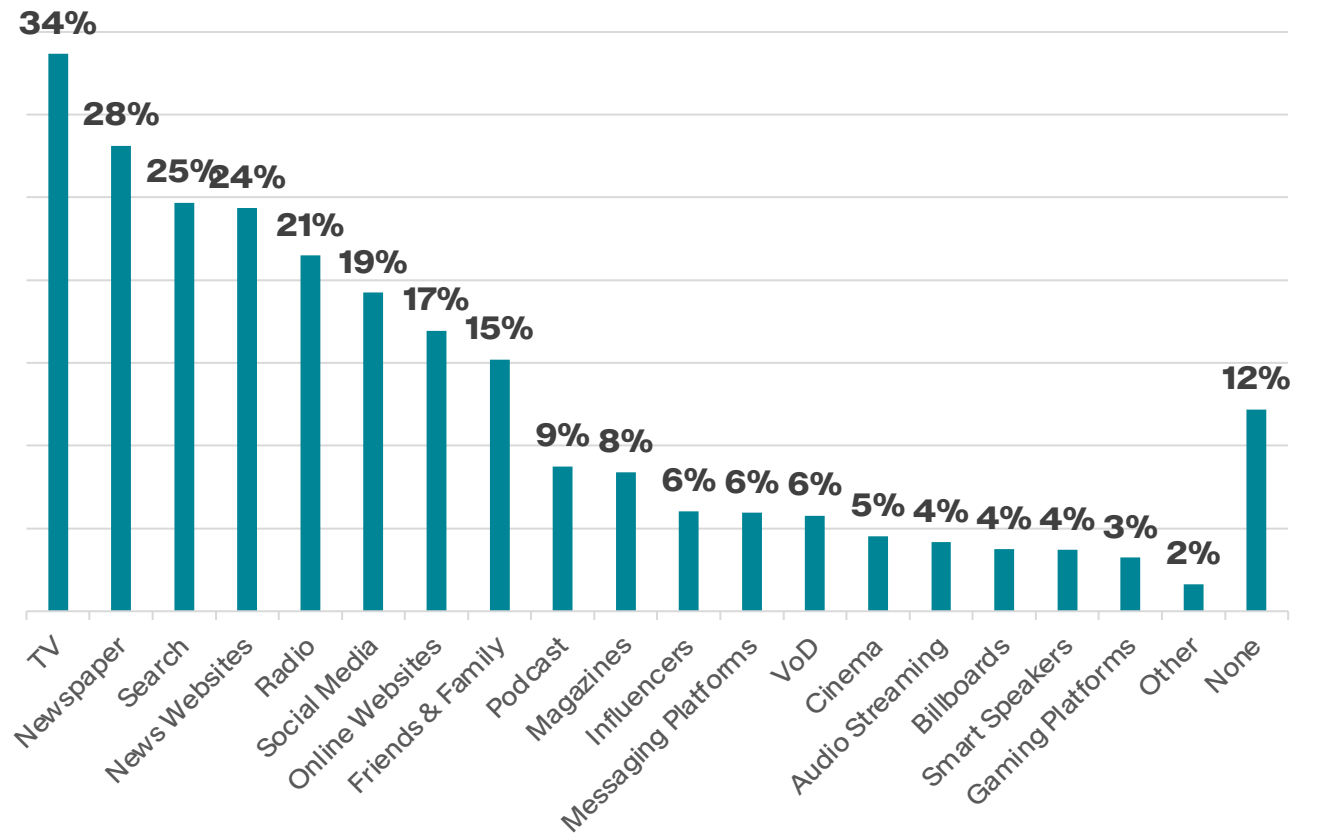
However, the **demand** for more **rigor** around **trust, ethics, and honesty** in the mediascape endures



TOP WORDS USED TO EXPRESS EXPECTATIONS  
FROM ADVERTISERS/ADVERTISEMENT TODAY?

**TV** continues to be the **most trustworthy & factually correct** channel

CHANNEL MOST TRUSTED FOR FACTUALLY CORRECT INFORMATION



Zoom in

# Trustworthy Media Channels

Older cohorts prioritize TV, while younger generations lean towards traditional channels but are more dispersed in the media they trust

What channel do you trust most for factually correct information?

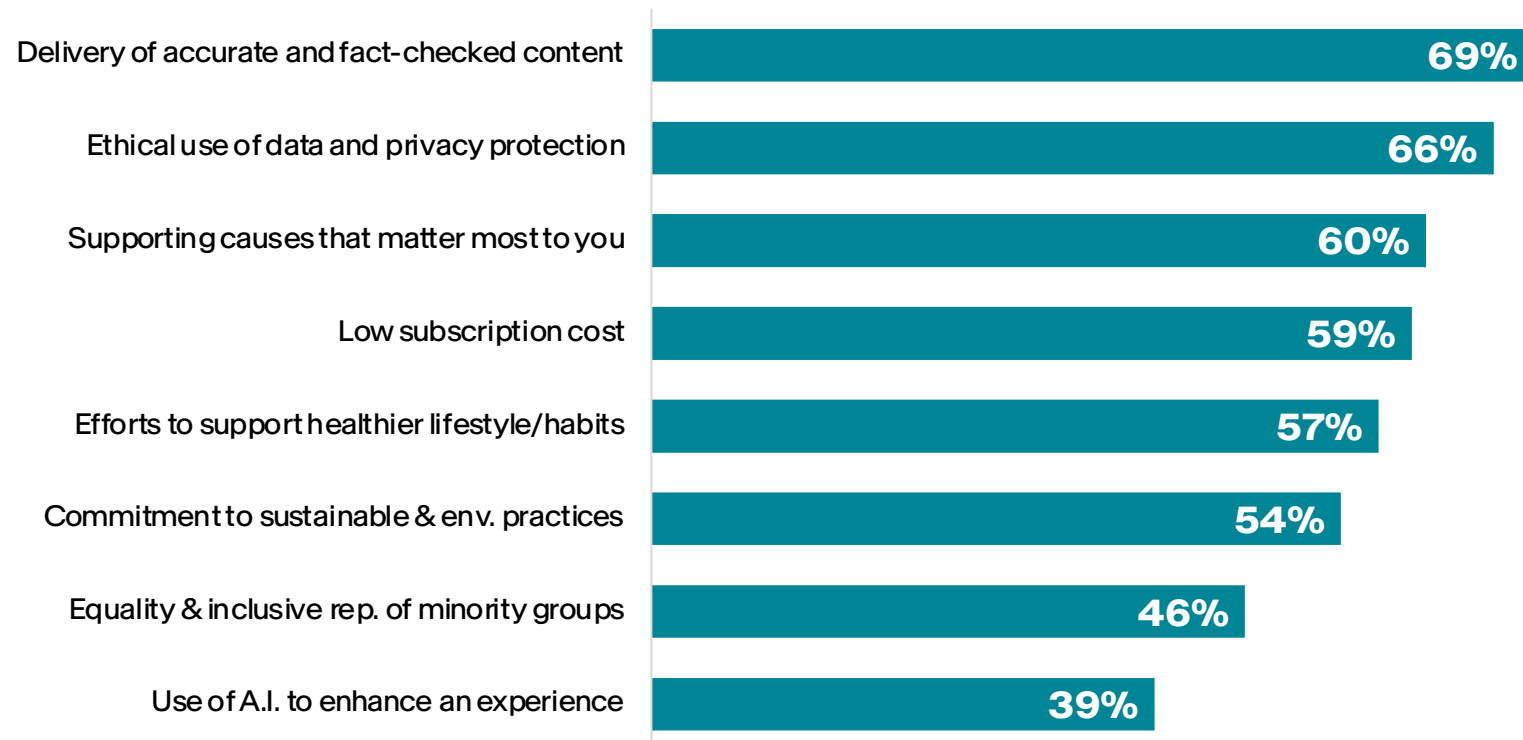
Channel	Global	18-24	25-34	35-44	45-54	55-64	65+
TV	34%	26%	30%	31%	35%	39%	40%
Newspaper	28%	27%	25%	28%	30%	30%	29%
Search	25%	26%	29%	25%	24%	23%	21%
News Websites	24%	23%	26%	25%	25%	24%	23%
Radio	21%	15%	17%	19%	24%	28%	25%
Social Media	19%	24%	26%	23%	19%	12%	11%
Online Websites	17%	17%	19%	21%	16%	13%	15%
Friends & Family	15%	15%	14%	17%	15%	14%	17%
Podcast	9%	11%	12%	10%	8%	7%	4%
Magazines	8%	9%	10%	8%	8%	8%	8%
Influencers	6%	8%	9%	8%	5%	3%	2%
Messaging Platforms	6%	7%	8%	7%	6%	4%	3%
Video on Demand	6%	8%	9%	9%	5%	2%	2%
Cinema	5%	7%	7%	5%	5%	2%	1%
Audio Streaming	4%	6%	7%	6%	4%	2%	1%
Billboards	4%	7%	6%	5%	3%	1%	1%
Smart Speakers	4%	6%	6%	5%	3%	2%	0%
Gaming Platforms	3%	5%	6%	4%	3%	1%	0%
Other	2%	1%	1%	1%	2%	2%	3%
None	12%	9%	10%	10%	13%	16%	15%

	France	Germany	India	Mexico	Spain	USA
TV	38%	34%	36%	29%	32%	33%
Newspaper	32%	25%	47%	17%	27%	21%
Search	19%	13%	35%	36%	27%	18%
News Websites	12%	20%	30%	35%	23%	26%
Radio	25%	25%	14%	19%	31%	15%
Social Media	12%	10%	32%	30%	15%	16%
Online Websites	10%	10%	25%	28%	14%	15%
Friends & Family	14%	14%	23%	13%	12%	14%
Podcast	6%	4%	11%	11%	8%	12%
Magazines	10%	8%	14%	7%	4%	7%
Influencers	4%	3%	13%	8%	4%	5%
Messaging Platforms	4%	4%	12%	6%	5%	5%
Video on Demand	5%	4%	11%	6%	4%	5%
Cinema	5%	2%	10%	4%	3%	3%
Audio Streaming	3%	3%	7%	5%	3%	4%
Billboards	4%	2%	7%	4%	2%	4%
Smart Speakers	2%	2%	8%	4%	3%	3%
Gaming Platforms	3%	2%	7%	3%	2%	3%
Other	2%	1%	1%	1%	1%	3%
None	15%	21%	5%	5%	12%	15%



# Media Publishers support of accurate content & safeguarded data remain top concerns

Consumer will consume content if publishers' support:









Zoom in

# Publishers Support

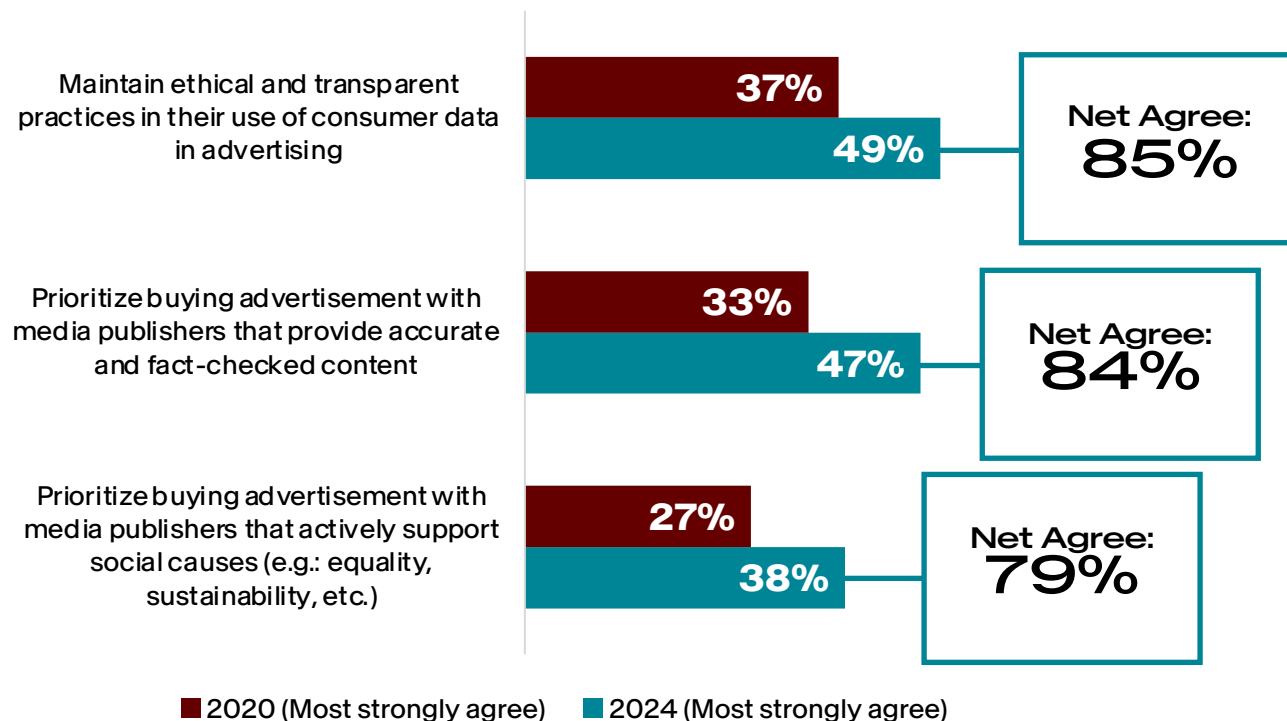
Older audiences tend to expect less support from publishers, especially against equality and Artificial Intelligence

How likely are you to choose what you consume based on publisher's support or use of the following?  
Below represent scale 4 & 5 (it strongly affects my decision)

	Global	18-24	25-34	35-44	45-54	55-64	65+	 France	 Germany	 India	 Mexico	 Spain	 USA
Delivery of <b>accurate and fact-checked</b> content	69%	69%	69%	68%	70%	6x6%	69%	63%	64%	81%	66%	69%	70%
Ethical use of <b>data and privacy protection</b>	66%	64%	68%	67%	67%	64%	62%	58%	50%	81%	70%	70%	64%
<b>Supporting causes</b> that matter most to you	60%	63%	63%	62%	61%	56%	55%	52%	57%	76%	58%	64%	54%
<b>Low subscription cost</b>	59%	62%	63%	62%	61%	55%	51%	58%	54%	67%	55%	62%	59%
Efforts to support <b>healthier lifestyle/habits</b>	57%	59%	62%	62%	58%	51%	47%	50%	41%	82%	59%	58%	49%
Commitment to <b>sustainable</b> and environmental practices	54%	59%	58%	57%	54%	49%	44%	49%	38%	76%	58%	56%	46%
<b>Equality</b> for and inclusive representation of minority and marginalized groups	46%	54%	53%	51%	46%	39%	34%	36%	34%	68%	47%	48%	45%
Use of <b>Artificial Intelligence</b> to enhance an experience	39%	50%	49%	44%	39%	29%	24%	28%	25%	66%	47%	33%	36%

Advertisers have **more responsibility** than ever

CONSUMERS BELIEVE ADVERTISERS HAVE A ROLE TO:



Zoom in

# Advertiser's Responsibility

70%+ of all segments believe advertisers have a responsibility across all areas

To what extent do you believe advertisers have a responsibility to do the following?  
Below represent scale 6-10



	Global	18-24	25-34	35-44	45-54	55-64	65+	France	Germany	India	Mexico	Spain	USA
Maintain <b>ethical and transparent practices</b> in their use of consumer data in advertising	85%	85%	87%	87%	87%	82%	81%	75%	75%	92%	91%	88%	88%
Prioritize buying advertisement with media publishers that provide actual and <b>fact-checked content</b>	84%	84%	87%	86%	85%	80%	80%	77%	74%	92%	89%	87%	84%
Prioritize buying advertisement with media publishers that actively <b>support social causes</b> (e.g.: equality, sustainability, etc.)	79%	83%	84%	82%	79%	74%	71%	74%	69%	92%	88%	82%	70%

# Key Takeaways

Personal benefits steer people's preferences; Offline media/experiences remain relevant; Lack of trust and transparency continue; Expectations for advertisers grow

01

BE MINDFUL OF  
CULTURAL CUES

02

MAKE IT PERSONAL

03

IT'S NOT ALL DIGITAL

04

TV REMAINS ON TOP,  
BUT DIGITAL CONTINUES  
TO DAZZLE

05

BE TRANSPARENT &  
STRAIGHTFORWARD

06

ESTABLISH QUALITY  
CHECKS ACROSS MEDIA  
PLACEMENTS

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