

AUTHORITY vs. FREEDOM: WHICH PATH WILL WE FOLLOW?

Prosumer Report
—
HAVAS

2025





Anything worrying you these days? Scratch that. We know the answer.

Our world is in such tumult that the keepers of dictionaries have added a new word:

Polycrisis (n) /'pɑː.liˌkraɪ.sɪs/

a time of great disagreement, confusion, or suffering that is caused by many different problems happening at the same time so that they together have a very big effect

Though coined in the last century, the term was only added to the Cambridge Dictionary in 2023 in recognition of its increased use. People are unsettled and scared, uncertain of what will come next or how to handle the problems already facing us.

To better understand how consumers are coping with these strains and how attitudes are changing, Havas Group surveyed 14,500 adults aged 18 and older in 30 countries. Our research reveals a growing tension between two fundamental forces: the yearning for freedom and the desire for structure and order.



No Clear Answers

This period of polycrisis coincides with an era in which we want clear answers and certainty but are less trusting of the institutions and leaders that might be able to supply them.

Trust is a rare value these days*

86%

I support more authority, but I don't trust those who wield it

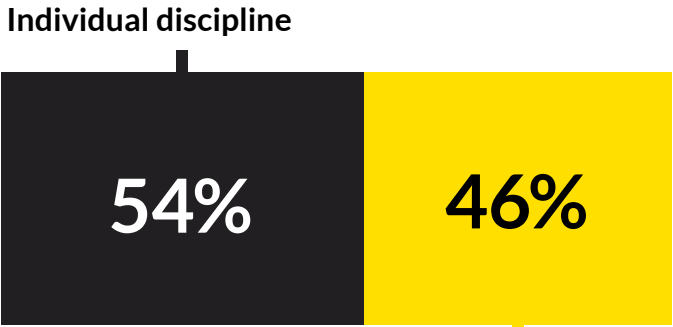
58%

(showing Prosumers; % agreeing strongly/somewhat)

*Prosumer Report: Restoring Trust, Havas Group, 2024

Nor can we seem to agree on solutions. Consider the response to climate change: Most of us now recognize it as an existential threat and a vital issue to address, but society is almost evenly divided between those who think solutions will come from individual discipline (e.g., reducing our personal carbon footprints) and those who believe it will require strict government mandates.

To solve the climate change issue, we are going to need: (showing Prosumers)



Strict rules enforced by governments



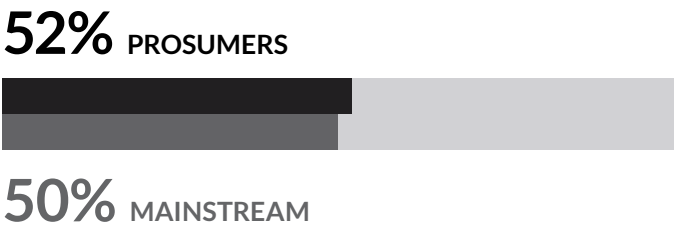
From Collective Power to Authoritarianism

There was a time not too long ago, according to our [earlier studies](#), when people had enormous faith in the collective power of individuals. Now, most think the world’s citizens are incapable of regulating their behavior, with self-discipline regarded as an increasingly rare trait. Consequently—and despite low levels of trust in authorities—a sizeable proportion of populations worldwide are embracing some degree of authoritarianism. Nearly 4 in 10 Prosumers and Gen Zs think the world’s problems are more likely to be solved by strong and authoritarian governments rather than democracies.

This reflects a shift we’re seeing globally. According to the nonpartisan [Freedom House](#), 46% of the world’s population lived in free environments in 2005, which the nonprofit defines as places having open political competition, respect for civil liberties, a significant independent civic life, and independent media. In essence, a country where citizens have a wide range of freedoms and rights, and the government is accountable to them. As of 2021, the share of citizens living in free environments had dropped precipitously, to just 20%. Some people are being stripped of their liberties against their will, but, as this Prosumer study shows, others are willingly accepting stricter governance in exchange for what they perceive as a better chance of taming the current chaos and uncertainty.

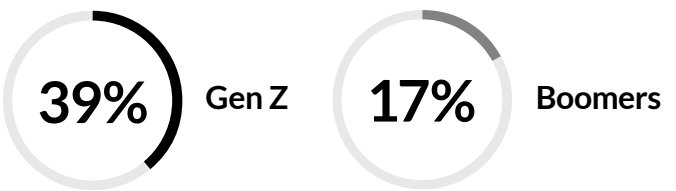
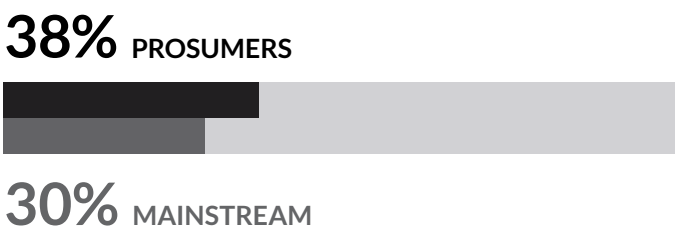


I think people are not able to self-regulate anymore



(% agreeing strongly/somewhat)

I think a strong and authoritarian government is more effective than a democracy in solving the world’s problems



(% agreeing strongly/somewhat)



I think a strong and authoritarian government is more effective than a democracy in solving the world’s problems

(showing Prosumers/mainstream; % agreeing strongly/somewhat)

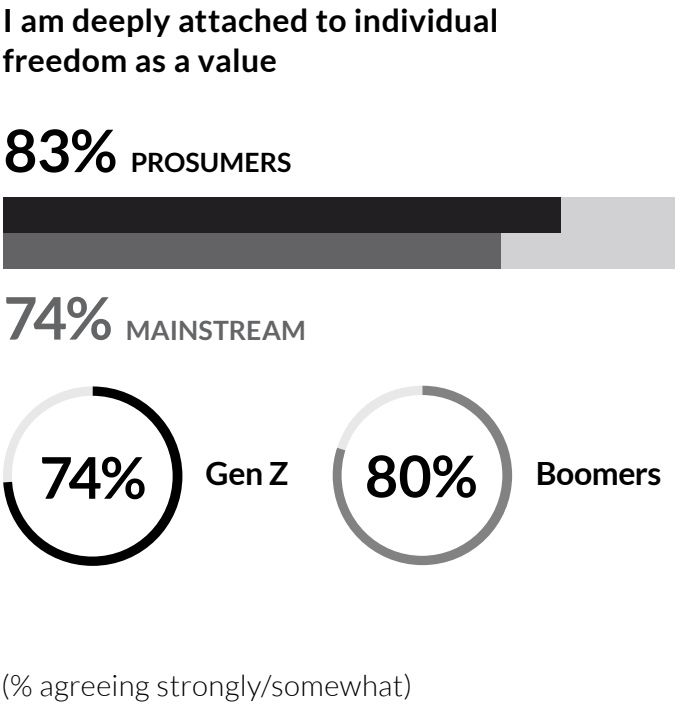
We see a pronounced global divide across our 30 respondent markets on the question of whether authoritarian governments are better suited than democracies to solving the world’s challenges. At one end of the spectrum are countries such as Japan, Ireland, Argentina, and Mexico, which resoundingly reject authoritarianism. At the other extreme are seven nations—mainly in Asia—whose populations are convinced that authoritarian governments are more effective than democracies in bringing about meaningful change: Malaysia, Greece, India, South Africa, United Arab Emirates, China, and the Philippines.



PARADOX: A FIRM HAND VS. FREE REIN

Evident throughout our survey results is a tension between two conflicting priorities. As a global society, most of us—including 83% of Prosumers—are firmly wed to the notion of individual liberty. And yet, nations with vastly different histories and cultures (e.g., India, China, and France) are all pushing for increased governmental control, even as other parts of the world (e.g., Brazil, the U.K., and the U.S.) champion freedom (at least in theory).

To better understand these competing movements, we explored what lies behind the concepts of freedom and control and how shifting consumer sentiments may impact brands.





A Strengthening Vortex of Authoritarianism



IS DEMOCRACY DYING?

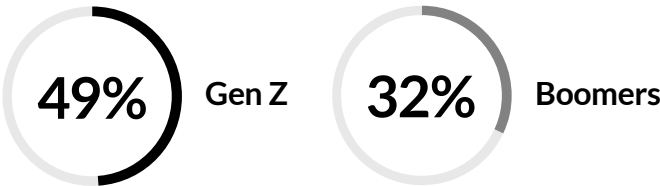
In the post-World War II era, democracy emerged as a beacon of prosperity and progress in much of the West. It appears that dream is withering as more people become convinced that this system of government is incapable of meeting the complex demands of our 21st-century world.

Democracy gives too much power to poorly informed citizens

49% PROSUMERS



43% MAINSTREAM



(% agreeing strongly/somewhat)

Around half of Prosumers believe that democratic rule gives too much power to the poorly informed. This attitude may be ascendent given that 49% of Gen Zs agree with that statement compared with less than a third of baby boomers.

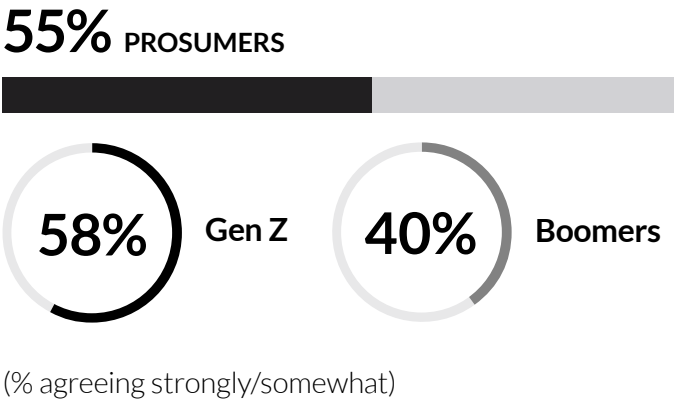




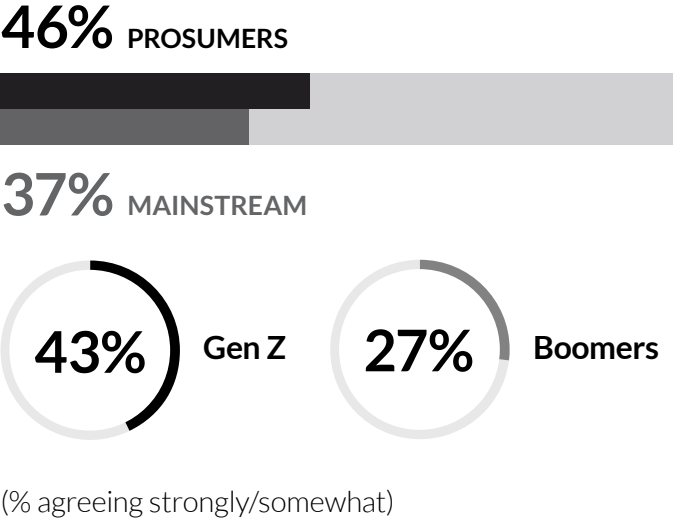
FREEDOM VS. THE RISK OF CHAOS

Underlying the push for authoritarian rule is fear—specifically, fear of chaos and what many see as societies moving in the wrong direction. In uncertain times, people want the assurance of leaders who project confidence and control. Most Prosumers agree that giving citizens too much freedom leads to disorder and increases the risk of chaos. Tellingly, 58% of the youngest respondents, Gen Zs, agreed with this statement compared with just 40% of boomers. There were also marked distinctions between nations, with just 40% of Americans agreeing with the statement, for instance, versus 65% of people in India.

I believe giving too much freedom to people leads to disorder and the risk of chaos



My country would be better off if my government exercised more authority

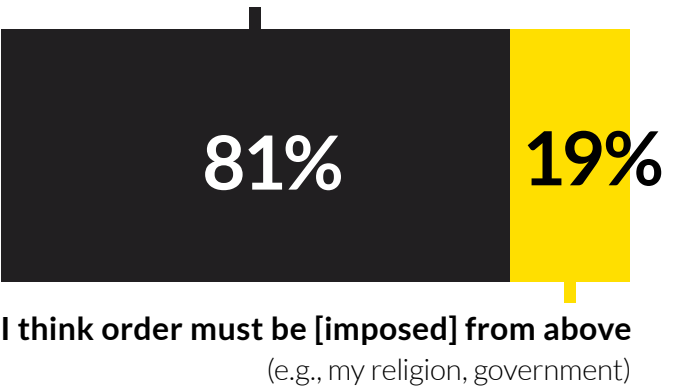


Given these concerns, it makes sense that nearly half of Prosumers think their country would be better off if their governments exercised more authority. Again, we see a generational divide, with 43% of Gen Zs agreeing versus just 27% of boomers. For post-World War II baby boomers, it appears, democratic freedoms are a hard-fought prize they are loath to give up.

Even under more authoritarian regimes, the world's citizens aren't absolved of personal responsibility: More than 8 in 10 respondents agreed that true order requires individual discipline.

Which statement better reflects your point of view? (showing Prosumers)

I think true order comes from individual discipline



Selective Clampdowns

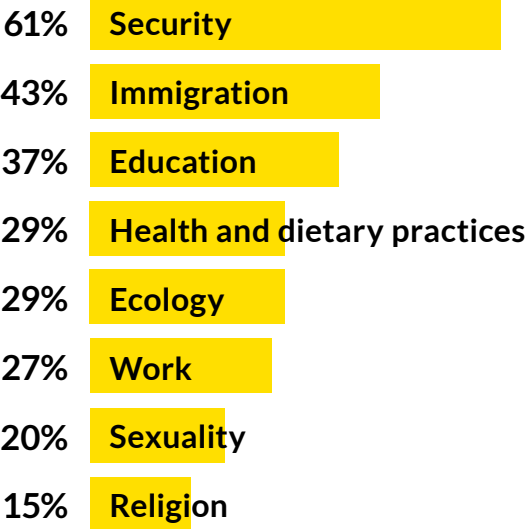
Even as people claim to want their governments to rule with a firm hand, that applies mainly to two sectors: **security** and **immigration**.



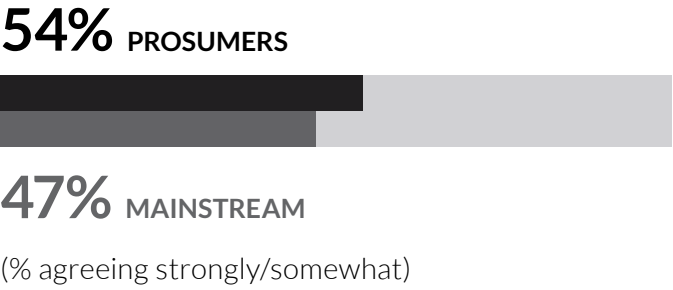
SAFETY FIRST

Around 6 in 10 Prosumers favor more restrictive laws related to security. This rises to 81% in Brazil. Moreover, 54% of Prosumers globally are willing to accept some loss of freedom to ensure safety. It's telling, however, that only 43% of Prosumers in Brazil agreed with this statement, suggesting that when people advocate for stricter laws and regulations, they are not necessarily anticipating that these restrictions will impinge on *their* rights.

My government should have more strict and restrictive laws on...
(showing Prosumers)



I think that to ensure safety, we must accept some loss of freedom



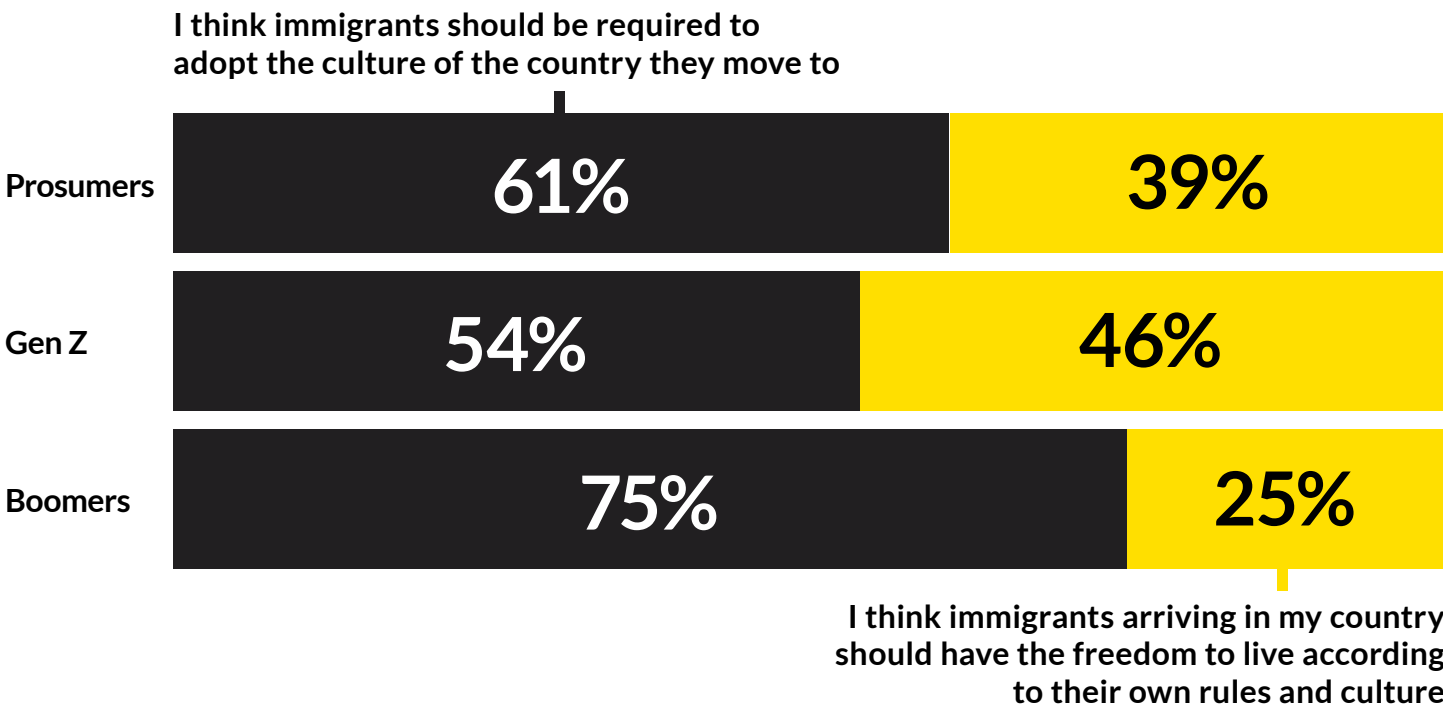


AN END TO MULTICULTURALISM?

More than 4 in 10 Prosumers are fed up with what they perceive as lax approaches to immigration and want to see stricter laws in place. We saw agreement from nearly twice as many baby boomers (57%) as Gen Zs (36%) on this statement, confirming that youth tend to be more open-minded about opening their countries’

borders to newcomers. And when immigrants do cross the border, around 6 in 10 Prosumers think they should be required to adopt the culture of the country they’ve moved to. The era of multiculturalism appears to be over. This statement, too, saw a generational divide, with agreement from three-quarters of boomers versus a bare majority of Gen Zs (54%).

Which statement better reflects your point of view?

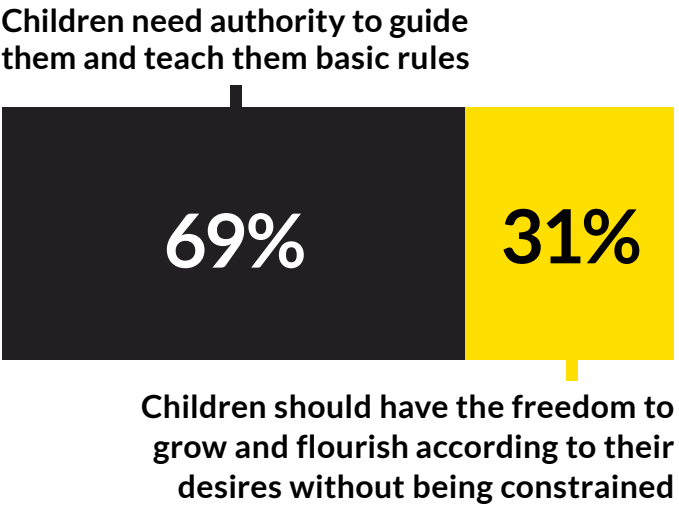


PUSHBACK AGAINST PERMISSIVENESS

The authoritarianism vs. freedom debate doesn’t just involve governmental affairs. Globally, there’s a sense that children have been given too much leeway in recent decades, as parents and teachers have embraced “child-centric” policies that cede power to youth.

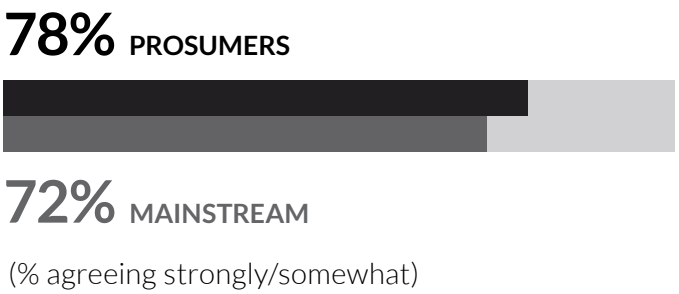
We asked respondents which of two statements better reflects their opinion: “Children need authority to guide them and teach them basic rules” or “Children should have the freedom to grow and flourish according to their desires without being constrained.” Across the board—by country, age group, and sex—significant majorities of respondents chose the former.

Which statement better reflects your opinion? (showing Prosumers)



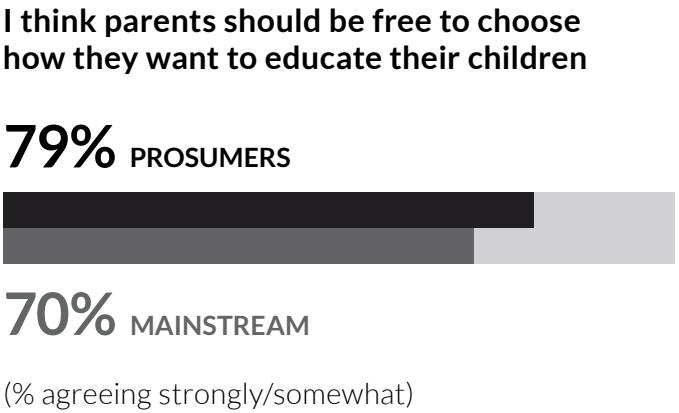
The desire to rein in children extends to the classroom, with more than 7 in 10 respondents calling for the authority of teachers to be strengthened.

The authority of teachers must be strengthened to aid learning



PARENTAL CHOICE

The authority of teachers should not be without limits, according to our respondents. In a range of countries, including the [United States](#) and [Australia](#), we’re seeing a surge of parents demanding the final word on how their children are educated—including what they are taught. In our study, 79% of Prosumers agreed that parents should have the freedom to determine how their children are educated, a sentiment that is especially strong in China, Brazil, and India.



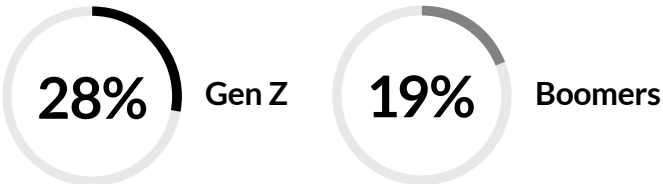


My government should have more strict and restrictive laws on health and dietary practices

29% PROSUMERS



25% MAINSTREAM



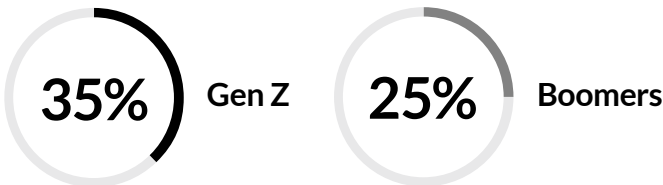
(% agreeing strongly/somewhat)

I believe the state and insurance companies should penalize people who do not take proper care of their health

38% PROSUMERS



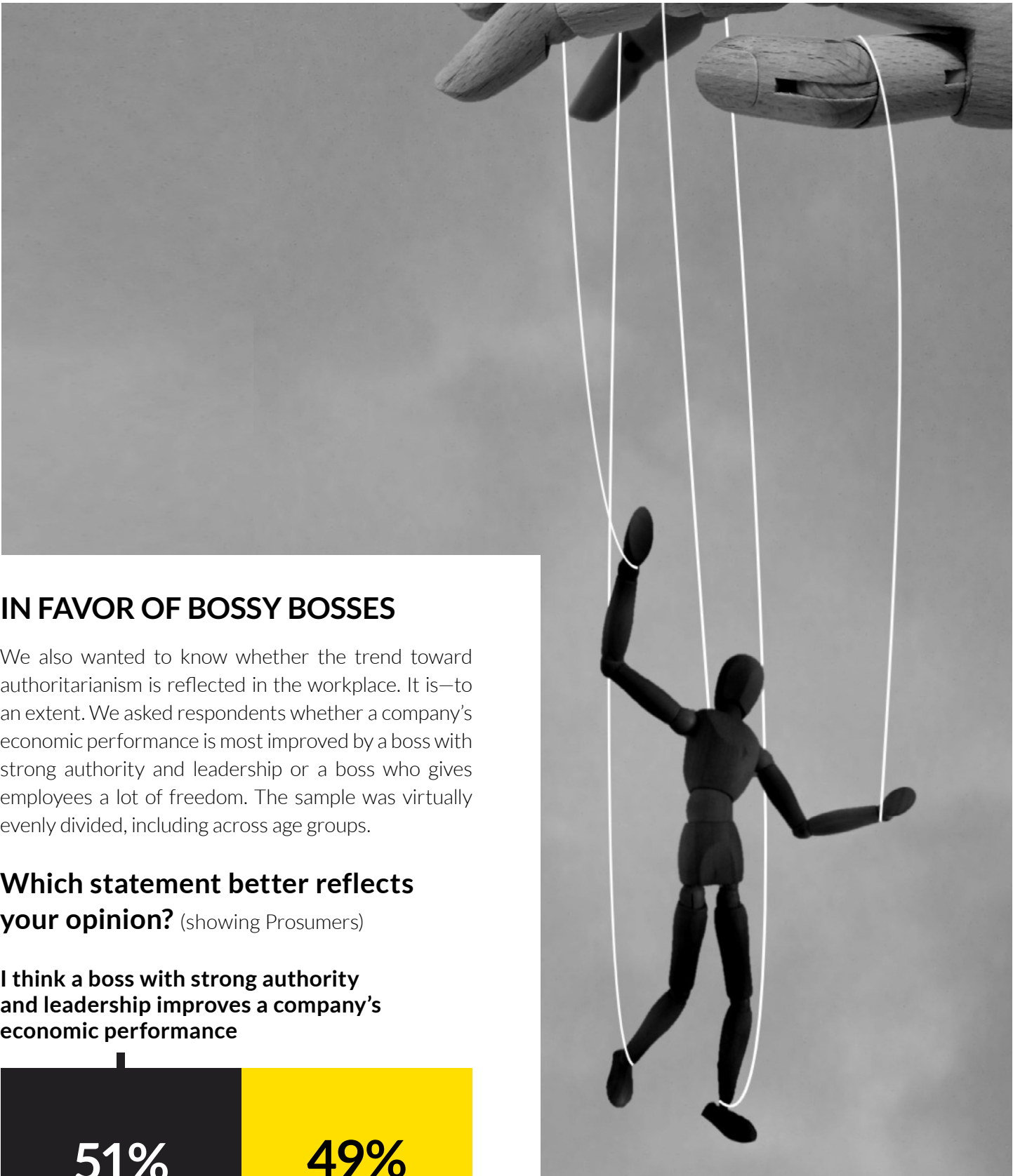
30% MAINSTREAM



(% agreeing strongly/somewhat)

MINDING OUR HEALTH

Nearly 3 in 10 Prosumers and 36% of Gen Zs (compared with just 19% of boomers) would like to see their governments enact stricter laws regarding health and dietary practices. Presumably, many respondents are keen on food and beverage companies being held to higher health standards, in keeping with the current debate involving **ultraprocessed foods**. Beyond that, however, there appears to be a growing intolerance of other people's poor health choices, likely due in part to the societal costs that accrue. More than a third of Prosumers and Gen Zs want their governments and insurance companies to penalize people who don't properly care for their health. In Germany, this increases to 61% of Prosumers.

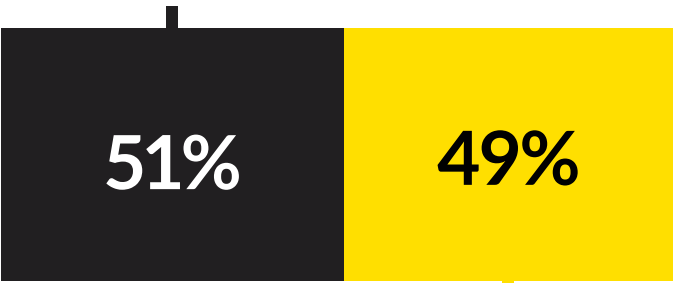


IN FAVOR OF BOSSY BOSSES

We also wanted to know whether the trend toward authoritarianism is reflected in the workplace. It is—to an extent. We asked respondents whether a company's economic performance is most improved by a boss with strong authority and leadership or a boss who gives employees a lot of freedom. The sample was virtually evenly divided, including across age groups.

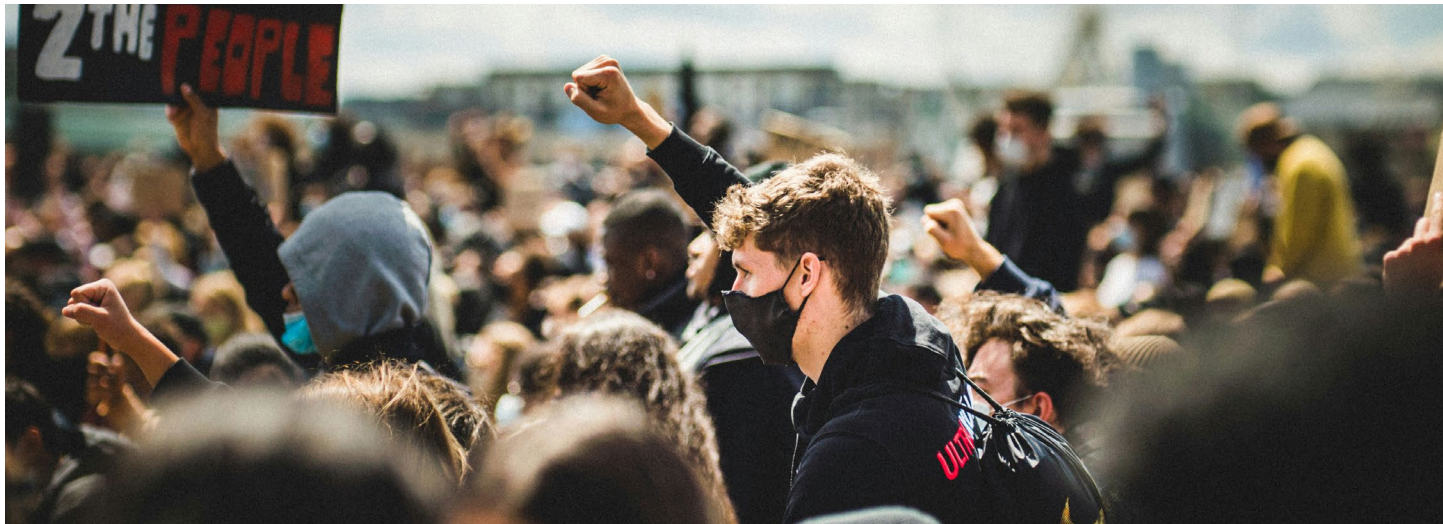
Which statement better reflects your opinion? (showing Prosumers)

I think a boss with strong authority and leadership improves a company's economic performance



I think a boss who gives employees a lot of freedom improves a company's economic performance

There are some sharp country divides, however, with respondents in France, for instance, far more likely to advocate a laissez-faire approach in the workplace, while those in the U.S., Brazil, and India prefer a firmer hand.



Don't Tread on Me

There is a disconnect globally. Even though many citizens are leaning toward authoritarianism in their quest to reestablish order and control as an antidote to polycrisis and chaos, people are simultaneously unwilling to cede their freedoms. They want their governments to establish strict rules without limiting their preferred behaviors.

I think it's important for my government to establish strict rules so that everyone can enjoy their freedoms without infringing on others

80% PROSUMERS



71% MAINSTREAM

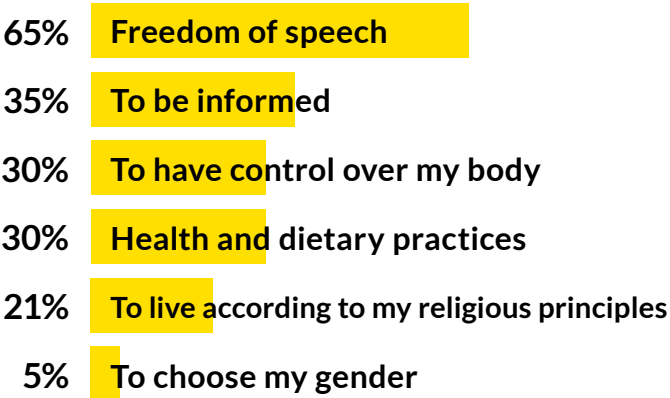
(% agreeing strongly/somewhat)

FREE SPEECH ABOVE ALL ELSE

When asked which freedoms they consider most essential, respondents unequivocally cited freedom of speech. Around two-thirds of Prosumers chose that option, compared with around a third who chose the next-most-popular response, the freedom to be informed, likely speaking to heightened concerns regarding the rise in misinformation, threats to a free press, and censorship.

For 3 in 10 Prosumers, two more personal freedoms also are essential: the freedom to control one's body and to love whom one chooses.

The most essential freedoms to me are... (showing Prosumers)

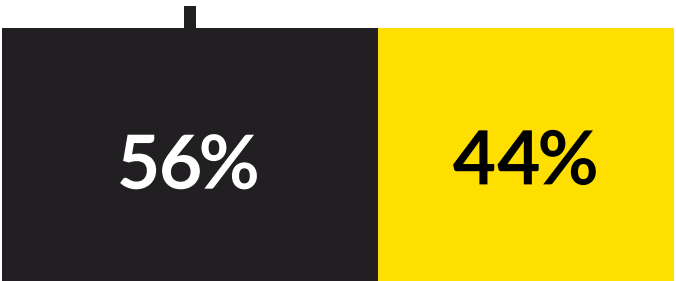


WHEN TO HOLD ONE'S TONGUE

Freedom of speech does not come without limits. While 44% of Prosumers advocate for the freedom to express anything at all, 56% believe the right to free speech ends when it provokes or offends others. There is a clear country divide here, with Americans, for instance, fully in the camp of unfettered speech (67%) versus three-quarters of Brazilians who advocate for limits.

Which statement better reflects your point of view? (showing Prosumers)

Freedom of speech ends when it provokes or offends others



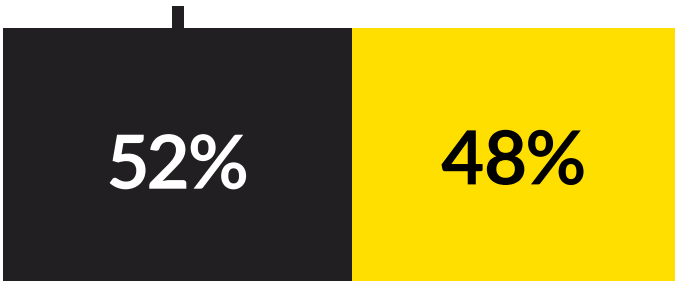
It is essential that everyone has the freedom to say what they think without any limits

HELL NO TO CENSORSHIP

We asked respondents which of two statements is most closely aligned with their point of view: that the internet should be controlled, even at the cost of limiting freedom of expression, or that any regulation of the internet is a form of censorship. The sample was almost evenly divided, with a slight majority (52%) opting for the former.

Which idea better reflects your opinion? (showing Prosumers)

The internet must be controlled, even if it limits freedom of expression



Any regulation of the internet is a form of censorship

Interestingly, more than 4 in 10 Prosumers consider fact-checking information a form of “disguised censorship.” It appears we are still squarely in the era of “truthiness” and “**alternative facts**.” This was confirmed by the 69% of Prosumers who agreed that freedom of expression allows fake news (and hate speech) to thrive online.

Fact-checking information is a form of disguised censorship

44% PROSUMERS



36% MAINSTREAM

(% agreeing strongly/somewhat)

Online freedom of expression allows hate speech and fake news to thrive

69% PROSUMERS



67% MAINSTREAM

(% agreeing strongly/somewhat)

THE MOST VALUED FREEDOMS ARE THOSE WE MUST FIGHT FOR

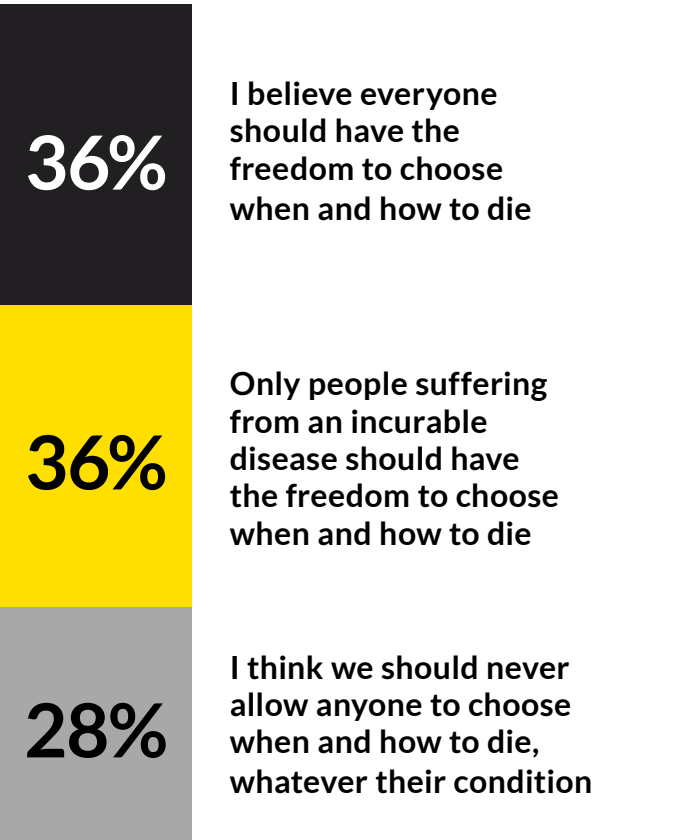
Globally, freedom of speech is regarded as the most essential freedom. When we dive into the country samples, however, hot-button issues of the day are reflected. And so we see, for instance, that 54% of U.S. Prosumers chose “the freedom to have control over my body,” which makes sense at a time when women’s right to bodily autonomy is **under attack** in that country. In Brazil, the second most essential freedom after speech is “the freedom to be informed,” selected by 55% of Prosumers, while in India, it’s “the freedom to love whom I want” (37%). The most important freedoms are those we must fight to defend.



IS END-OF-LIFE THE FINAL FREEDOM FRONTIER?

We presented respondents with three statements pertaining to the right to die in the manner of one’s choosing. The global sample was deeply divided, with just under a third choosing either that everyone should have the freedom to choose when and how to die or that this freedom should be limited only to those suffering from an incurable disease. Just over a quarter of respondents don’t believe anyone should be accorded this right, regardless of their condition.

Which statement best reflects your opinion? (showing Prosumers)

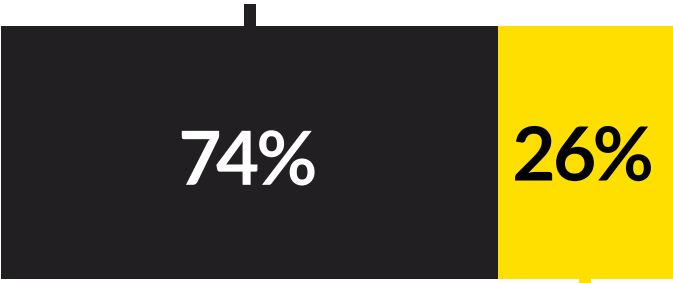


How Can Brands Balance Collective Order vs. Individual Freedom?

In a world increasingly favoring authoritarian approaches while defending personal liberties, how are brands meant to behave, and what new restrictions might they face? Our first clue to the answer comes from a question about the economy. Our results show that even as democratic processes are under threat in much of the world, capitalism is going strong.

Which statement better reflects your point of view? (showing Prosumers)

A free market economy is a source of growth for everyone



A free market economy only benefits the wealthy

Around three-quarters of Prosumers and two-thirds of the mainstream believe a free market economy is a source of growth for everyone. This suggests that the desire for control we’re seeing won’t trickle down to brands. However, this should not be taken to mean that brands are exempt from criticism—and even condemnation.



THE HEAVY COST OF CONSUMPTION

Around 2 in 3 Prosumers are convinced that unlimited consumption is destroying our planet. This is the majority opinion in every market surveyed, reaching a high of 82% agreement in South Africa.

I think the freedom to consume as much as we like is destroying the planet

67% PROSUMERS



61% MAINSTREAM

(% agreeing strongly/somewhat)

LOOKING FOR SCAPEGOATS

The consumerist economy has been gaining strength for three-quarters of a century, starting in the aftermath of World War II. Rather than solely blaming themselves and their fellow shoppers for this destructive trend, consumers are pointing the finger at other contributing forces. Currently, so-called “influencers” are cast in the role of villain, with 71% of Prosumers agreeing that these social media personalities should be more strictly regulated. Agreement ranges from 53% in the U.S. to 92% in China.

I believe what influencers can do should be more strictly regulated

71% PROSUMERS



65% MAINSTREAM

(% agreeing strongly/somewhat)



WILL WE PULL THE PLUG ON ADS?

No one is advocating for a widescale ban on advertising, but that doesn’t mean specific sectors aren’t facing censure. More than 4 in 10 Prosumers would like to see a ban on the advertising of junk food, and 79% go even further and advocate for a ban on brands selling products that are harmful to health. We see majority agreement on this statement in every market surveyed.

Advertising should be banned for:



(showing Prosumers)

It should be forbidden for brands to sell products that are harmful to health

79% PROSUMERS



78% MAINSTREAM

(% agreeing strongly/somewhat)

In contrast, there is relatively little support for banning advertising for products that are detrimental to the environment, such as fast fashion and combustion-powered vehicles. Even fewer people (just 4% of Prosumers globally) would support a ban on airline advertising, in keeping with the hunger for travel we uncovered in our 2024 [Travel & Tourism](#) report. It’s clear that most people are willing to accept environmental harm as a cost of doing business but are less accepting of products that could damage themselves or their loved ones in the near term.

IN A NUTSHELL

WHAT PROSUMERS WANT FROM BRANDS

We know from our [previous studies](#) that today’s consumers expect businesses—large corporations and high-profile brands especially—to contribute positively to society, including by helping solve significant challenges. As more people turn toward authoritarianism as a hoped-for antidote to uncertainty and chaos in this era of polycrisis, there is a role for brands able to communicate a clear and compelling vision of a better, more stable tomorrow.

1.

Restrictions for thee, not for me: People want to live in a world that’s more ordered and secure, but they’re unwilling to cede their personal liberties in exchange.
2.

Democratic processes are under threat as a growing percentage of citizens worldwide grow dissatisfied with the direction in which their countries are moving.
3.

At a time when people are desperate for certainty and security, trusted figures and sources of information are scarce—potentially opening up space for brands.
4.

People seek a return to self-discipline, including in matters of health. There is an opportunity for healthcare brands to do more to empower personal progress and accountability.
5.

The embrace of multiculturalism is waning, with more people advocating for a return to the “melting pots” of old.
6.

The internet—along with social media—will increasingly be at the center of debates over free speech vs. public safety.
7.

The most zealously guarded freedoms in individual countries are those citizens must continue to fight for, including bodily autonomy for women and the right to love whom one chooses.
8.

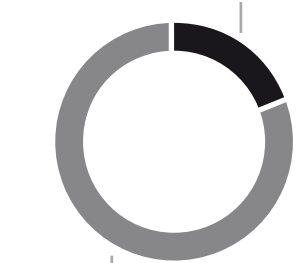
Regardless of current threat levels, concerns over climate change are secondary to concerns related to health and wellness. Food and beverage brands can anticipate an uptick in pressure as more people question the long-term implications of what they eat and drink.



About the Study

In the first quarter of 2025, Havas partnered with Market Probe International to survey 14,500 people ages 18+ in 30 markets: Argentina, Australia, Austria, Brazil, Canada, Chile, China, Colombia, Czech Republic, Egypt, France, Germany, Greece, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Philippines, Poland, Saudi Arabia, South Africa, South Korea, Spain, Thailand, United Arab Emirates, United Kingdom, and United States.

The survey sample was made up of **18% leading-edge Prosumers**



and **82% 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

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