The New Power of Communities
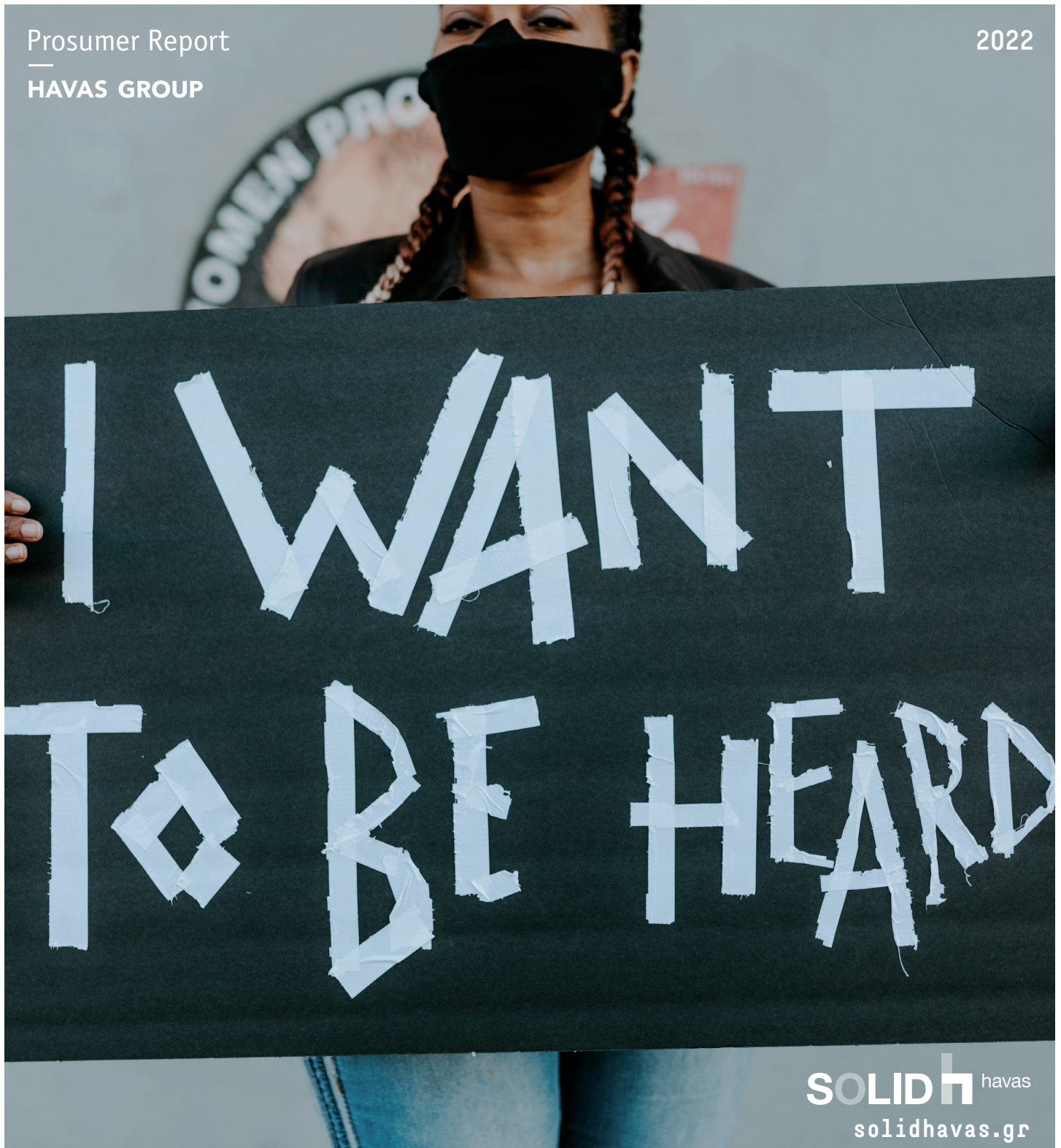
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Communities have existed for as long as humankind. They're the building blocks of civilization—natural associations that form around shared experiences and common interests and imbue their members with a sense of belonging, trust, and identity. Communities make it easier for people to socialize, form interpersonal bonds, and integrate into new environments, but they are so much more. They offer protection, establish and enforce social rules, and serve as both shelter and cudgel, channeling the might of their members to promote the interests of the group.

Belonging to a community makes it easier to socialize

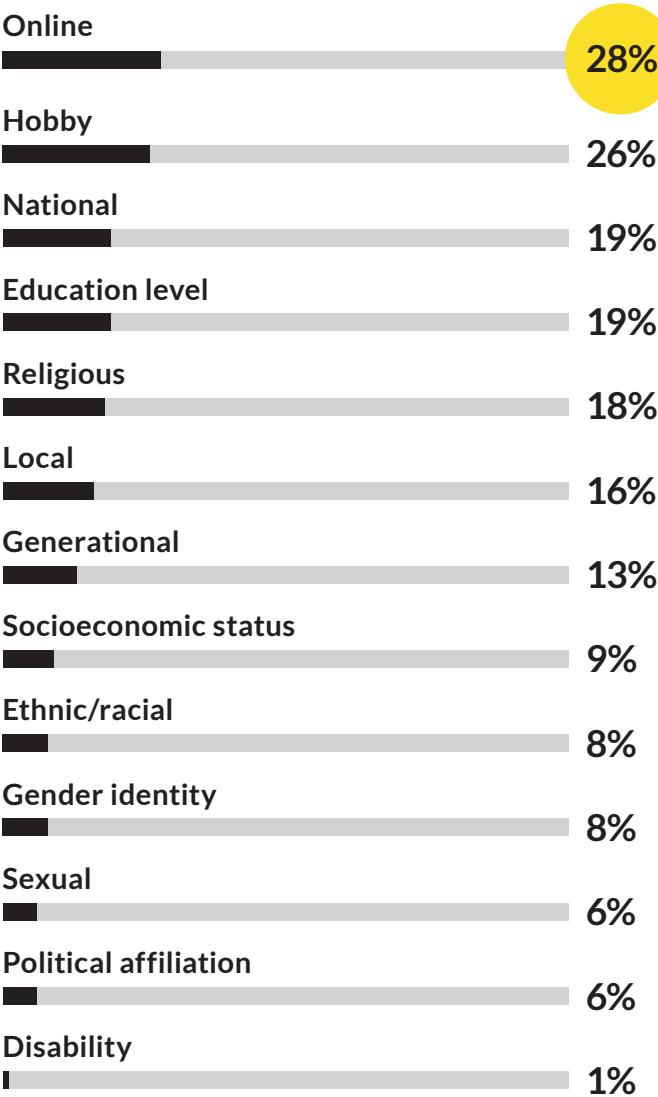|	
87% PROSUMERS	
72% MAINSTREAM	

(% agreeing strongly/somewhat)

In early 2022, Havas Group commissioned a survey of 14,600 women and men in 30 markets to explore the value and impact of communities and how these vital webs of connectivity are changing in the digital era. We uncovered three new realities:
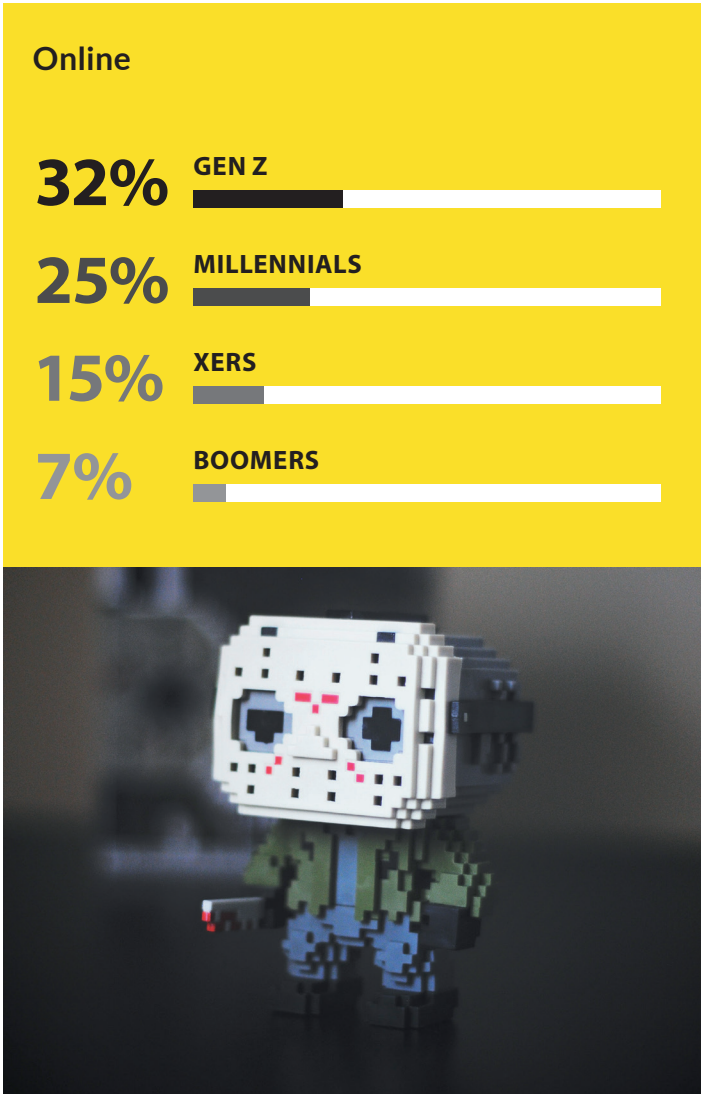
Today, the most powerful communal ties are forged over the internet.

Religious beliefs, nationality, and physical location still matter, but when we asked Prosumers with which community they identify most strongly, their top response globally was their online groups. It was also the leading response of our youngest respondents, selected by around a third of Gen Zs. Whether centered around gaming, politics, pop culture, environmentalism, fashion, sports, or another interest, these virtual forums offer instant access to like-minded others. Nearly as many Prosumers identify most strongly with people who share their hobbies, suggesting that online gaming communities are an even stronger draw. As the metaverse develops, further blurring the lines between real and virtual, we can expect these digital communities to grow in number, size, and influence.

With which of these communities do you most strongly identify? (showing Prosumers)

Community	%
Online	28%
Hobby	26%
National	19%
Education level	19%
Religious	18%
Local	16%
Generational	13%
Socioeconomic status	9%
Ethnic/racial	8%
Gender identity	8%
Sexual	6%
Political affiliation	6%
Disability	1%

With which of these communities do you most strongly identify?

Online

|	
32%	GEN Z
25%	MILLENNIALS
15%	XERS
7%	BOOMERS

Communities offer a staging ground for action at a time when society is perceived as increasingly inequitable.

When we asked why communities are increasingly important, the top Prosumer response globally was that there is a heightened need for social justice and equality. Moreover, 7 in 10 Prosumers globally, rising to 86% in Brazil, agree that more communities are forming in response to governments' failure to meet the needs of their populations. For a growing number of people, forging or joining a community has become a way to organize and effect change.

We are seeing a growing emphasis on communities because there is more of a need for social justice and equality

46%

PROSUMERS

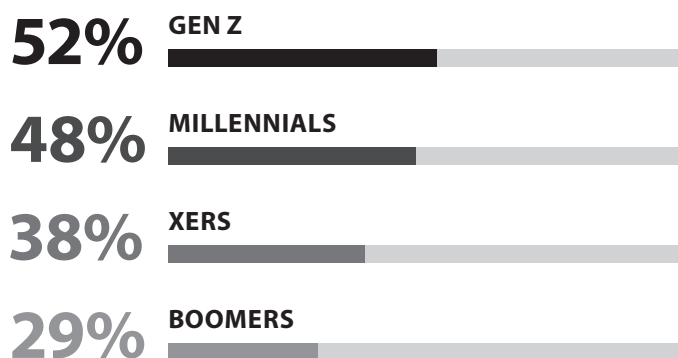|		
BRAZIL		63%
CHINA		38%
FRANCE		26%
GREECE		40%
UK		44%
US		45%

PROSUMERS
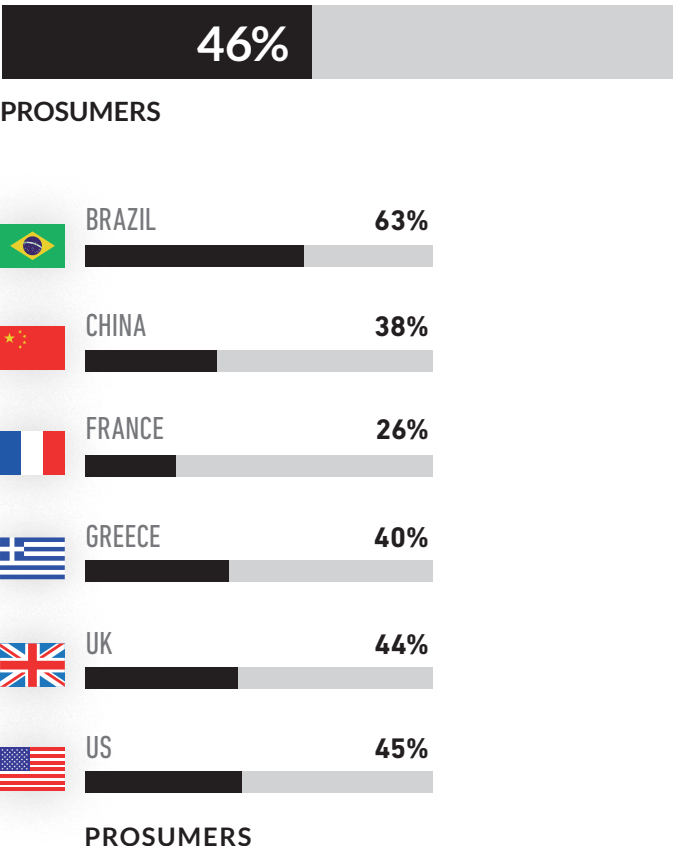
Younger generations define themselves less by nationality than by the communities to which they belong.

We can see this in social media profiles, for instance, where young users are more likely to proclaim their sexuality, diet, pop culture preferences, or political ideology than their country. This trend is backed up by third-party research. A **2019 US poll** conducted by Morning Consult, for instance, found that only around a third of Gen Zs—compared with nearly two-thirds of older adults—consider being an American a very important part of their personal identity. Research in the **UK** shows a similar decline in national identification among youth.

I have a stronger connection to my community (e.g., religious, ethnic, sexual) **than to my country**

47% GEN Z

44% MILLENNIALS

35% XERS

23% BOOMERS
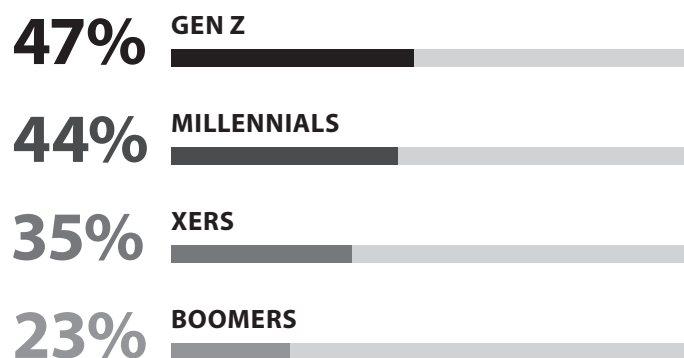
The community I belong to defines who I am more than my nationality does

52% GEN Z

48% MILLENNIALS

38% XERS

29% BOOMERS

(% agreeing strongly/somewhat)

In this report, we explore how communities are transforming, the new tensions arising, and lessons for brands.

1. Community Changeover

As the world becomes ever-more digitized and globalized, the nature and purpose of communities are changing.

1.1: *FROM* **SHARING A CULTURE** *TO* **DEFENDING TRADITIONS**

Nearly three-quarters of Prosumers believe the vitality of a community is linked most closely to the strength of its culture and values. Throughout history, that culture has derived primarily from a physical place. Today, location is less important than shared mindsets, as we can see, for example, in the growth of **meme-based communities** online.

The strength of a community is linked to the strength of its culture and values

73% PROSUMERS

64% MAINSTREAM

Communities are critical differentiators pushing back against the sea of sameness that threatens to engulf global society. Around 8 in 10 Prosumers credit communities with keeping local traditions alive and are convinced that thriving communities enrich global culture. Communities serve as a bulwark against the relentless homogenization of commerce, cities, and culture.

Communities allow traditions to remain alive rather than be absorbed into the global culture

79% PROSUMERS

67% MAINSTREAM

The more communities thrive in society, the richer our global culture will be

82% PROSUMERS

64% MAINSTREAM

(% agreeing strongly/somewhat)

I rely on my community to share and preserve my culture/traditions

46% PROSUMERS

35% MAINSTREAM

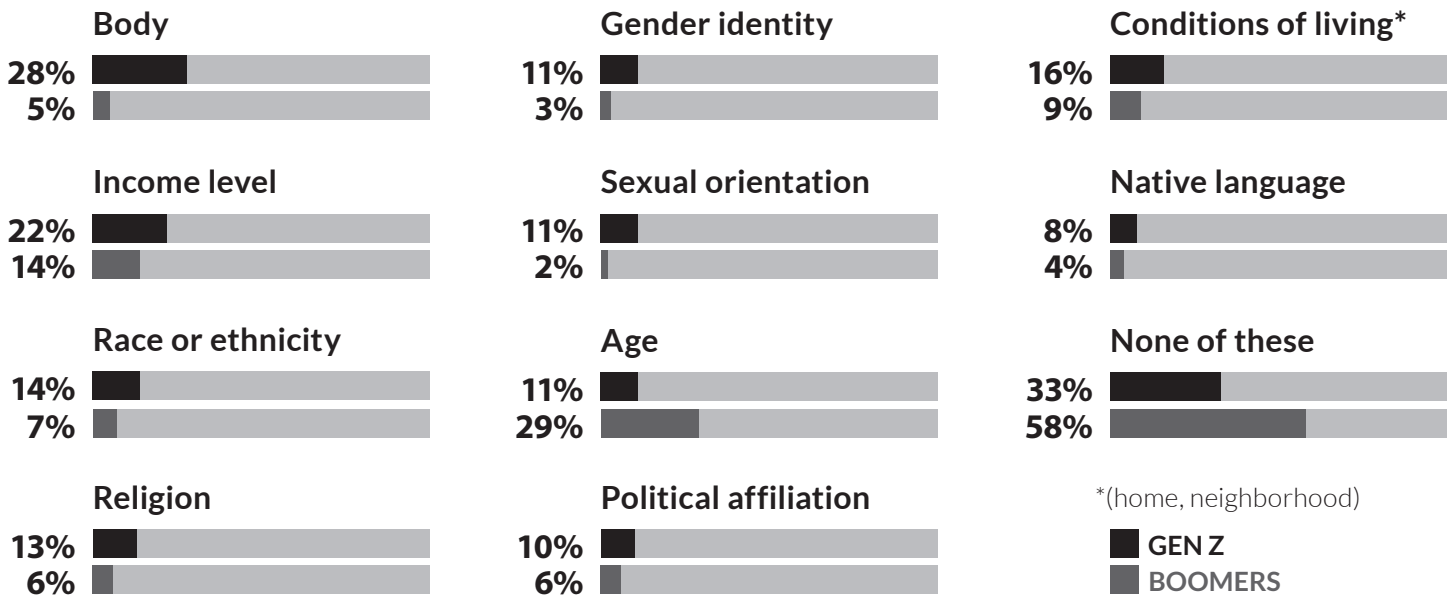## 1.2: *FROM* **SILENT SHELTERS** *TO* **LOUD VOICES**

Communities have always conferred some degree of protection from outsiders. In the internet age, threats routinely come over the digital transom in the form of cyberbullying, sexual harassment, doxing, dogpiling, and other forms of assault. For youth, in particular, feeling part of a community can help them withstand negative interactions.

We presented respondents with a list of 10 characteristics—ranging from age and income to political affiliation and gender identity—and asked which cause them to feel increasingly discriminated against. Tellingly, only one-third of Gen Zs, compared with 58% of boomers, indicated that none of the traits cause them to face rising discrimination. The

number one reason Gen Zs feel discriminated against: "my body"—cited by 28% of Zs compared with 5% of boomers. There are **plentiful studies** demonstrating the detrimental impact of social media on young people's mental health. Having the support of a community can make a difference, as we saw recently when a teenager who was fat-shamed by a member of the US Congress **rallied supporters** to raise more than $2 million for a cause the congressman opposes.

For youth, communities are regarded as safe spaces in which they can be themselves. Four in 10 Gen Zs—versus just 23% of boomers—believe people's need to express themselves freely contributes to the growing emphasis on community. "Judgment free" zones where users can interact anonymously offer valuable support to young people struggling with their sexual identities, home lives, body image, and more.

Gen Z in the Crosshairs   *I feel increasingly discriminated against because of my...*

Body
28% GEN Z
5% BOOMERS

Gender identity
11% GEN Z
3% BOOMERS

Conditions of living*
16% GEN Z
9% BOOMERS

Income level
22% GEN Z
14% BOOMERS

Sexual orientation
11% GEN Z
2% BOOMERS

Native language
8% GEN Z
4% BOOMERS

Race or ethnicity
14% GEN Z
7% BOOMERS

Age
11% GEN Z
29% BOOMERS

None of these
33% GEN Z
58% BOOMERS

*(home, neighborhood)

■ **GEN Z**
■ **BOOMERS**

Religion
13% GEN Z
6% BOOMERS

Political affiliation
10% GEN Z
6% BOOMERS

We are seeing a growing emphasis on communities because there is more of a need to express oneself without feeling judged
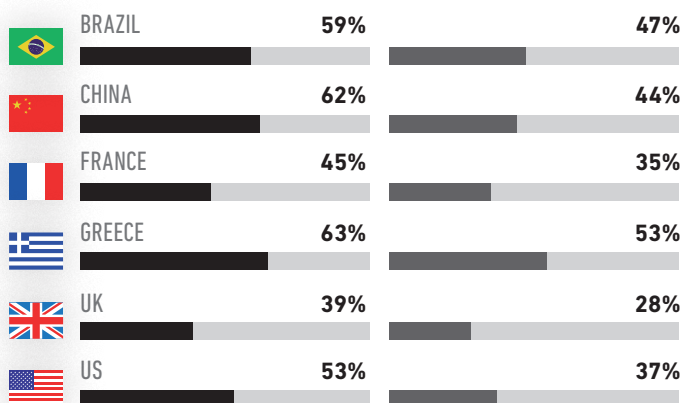
GEN Z 40%   **BOOMERS 23%**

what it offers its members but from its level of influence on society. Whether it's Texas moms **banding together** to combat anti-transsexual legislation, young Nigerians **protesting** sexual violence, or the BTS ARMY **raising funds** for the #BLM movement, people are activating communities to drive change.

The strength of a community is linked to the influence it has on society

52% PROSUMERS

43% MAINSTREAM

I rely on my community to protect me from harm

32% PROSUMERS

24% MAINSTREAM

Once people congregate around shared traits, ambitions, needs, and interests, these places of shelter can emerge as potent platforms for advocacy. For a majority of Prosumers—reaching a high of 76% in India—a community's strength is derived not just from

	PROSUMERS	MAINSTREAM
BRAZIL	59%	47%
CHINA	62%	44%
FRANCE	45%	35%
GREECE	63%	53%
UK	39%	28%
US	53%	37%

Communities grow in response to governments failing to meet the needs of the population

70% PROSUMERS

60% MAINSTREAM

If faced with an obstacle, I know I can rely more on my community than on my institutions

68%

PROSUMERS

I feel more empowered to speak up for what is right because of the community I belong to

76%

PROSUMERS

(% agreeing strongly/somewhat)

1.3: *FROM* **PROTECTION** *TO* **CONQUEST**

Communities are serving needs that governments and other institutions fail to fulfill, according to 7 in 10 Prosumers. More than two-thirds of Prosumers globally—reaching highs of 87% in Africa (Ivory Coast, Kenya, Nigeria) and 83% in China—indicate that when faced with an obstacle, they can rely more on their communities than on institutions. A majority of Prosumers also rely on their communities to support their rights and uphold their dignity. And three-quarters say the mere fact of belonging to a community can make them feel empowered to speak out on an issue they care about.

I rely on my community to support my rights and uphold my dignity

52% PROSUMERS

38% MAINSTREAM

More and more, communities serve as platforms for activism. Just over 8 in 10 Prosumers consider the most unified communities to be those built around a common fight. Communities spring up in support of causes both general (e.g., women's or indigenous rights) and specific (e.g., opposition to or support for a piece of legislation). TikTok, in particular, is emerging as a **powerful forum** for political action.

The size of a community matters, but not as much as the strength of its culture and societal influence.

The most unified communities are those built on a common cause/fight

81% PROSUMERS

69% MAINSTREAM

(% agreeing strongly/somewhat)

The strength of a community is linked to its size

31%

PROSUMERS

FROM	TO
Sharing values ——→	**Fighting standardization**
A safe space to retreat ——→	**A springboard for advocacy**
Protection ——→	**Empowerment and conquest**

2. Emerging Tensions

The growing emphasis on communities as drivers of change and identity is leading to tensions both within and between groups.

2.1: COMMUNALISM *VS.* **UNIVERSALISM**

On the whole, communities are regarded as vehicles for progress, with only 15% of Prosumers believing these groups threaten the public interest compared with 85% who say they contribute to the functioning of a healthy society. Although a majority of respondents in all countries surveyed feel that way, there are disparities. In France, for instance, only 55% of Prosumers—compared with 97% in the Philippines—believe communities contribute to a healthy society. The French response likely reflects that country's ongoing **struggle** with immigrant populations and a desire among some natives to maintain the traditional national culture. The French are also more likely than average to worry about the self-centeredness of minority communities, although their agreement level on this statement (53%) pales in comparison with that of China (75%). The concern for some is that minority groups' insular focus can detract attention (and, presumably, resources) from pressing universal issues. Nearly two-thirds of Prosumers also worry about the potential for communities to become radicalized, a sentiment held by 84% of Prosumers in France versus just 55% in the US.

Which comes closer to your point of view? (Choose one / showing Prosumers)

The increasing power of communities contributes to the functioning of a healthy society
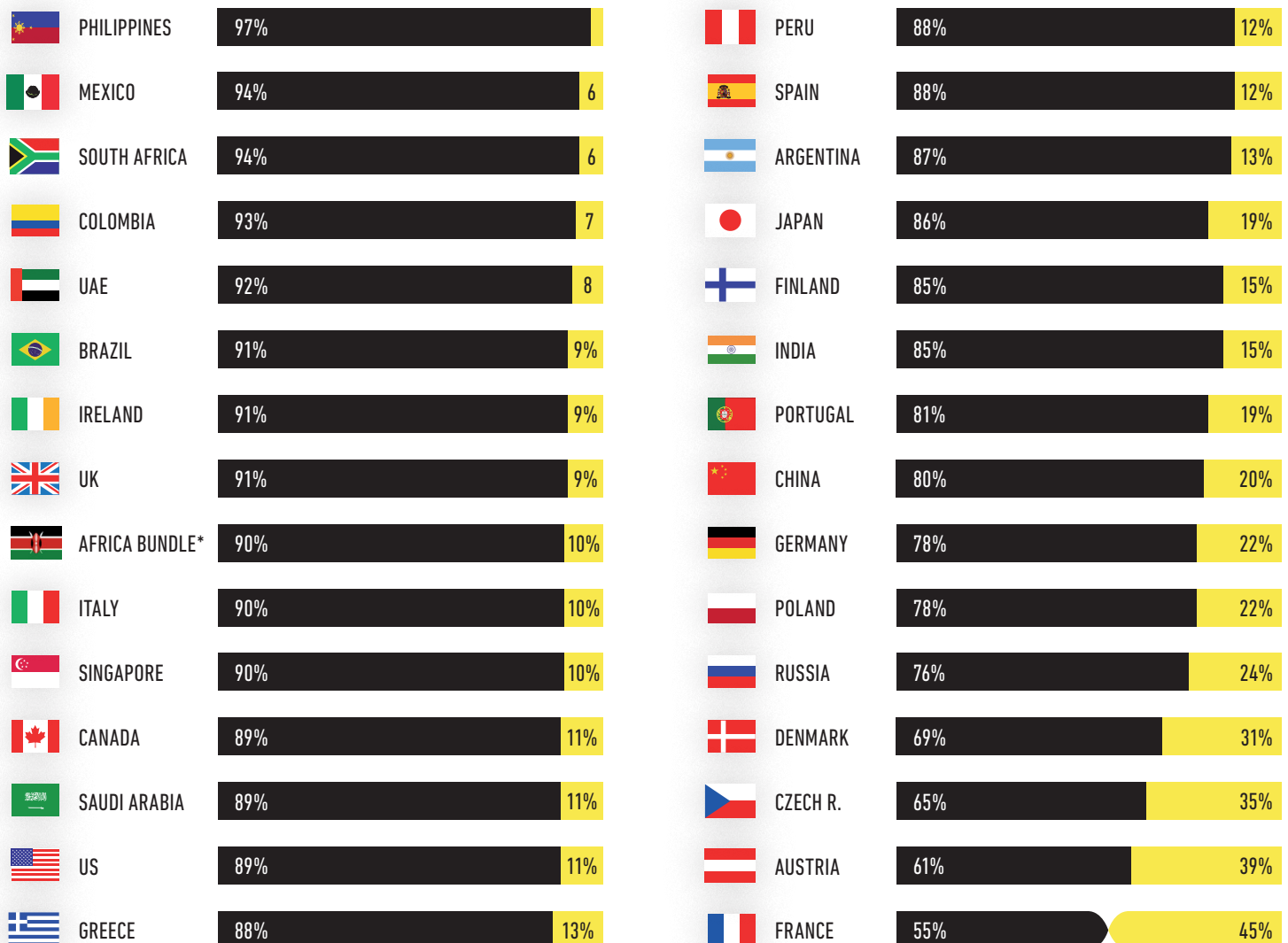
85%

The increasing power of communities threatens the public interest

15%

SHOWING PROSUMERS (functioning/threatens):

*Ivory Coast, Kenya, and Nigeria

PHILIPPINES	97%			PERU	88%	12%
MEXICO	94%	6		SPAIN	88%	12%
SOUTH AFRICA	94%	6		ARGENTINA	87%	13%
COLOMBIA	93%	7		JAPAN	86%	19%
UAE	92%	8		FINLAND	85%	15%
BRAZIL	91%	9%		INDIA	85%	15%
IRELAND	91%	9%		PORTUGAL	81%	19%
UK	91%	9%		CHINA	80%	20%
AFRICA BUNDLE*	90%	10%		GERMANY	78%	22%
ITALY	90%	10%		POLAND	78%	22%
SINGAPORE	90%	10%		RUSSIA	76%	24%
CANADA	89%	11%		DENMARK	69%	31%
SAUDI ARABIA	89%	11%		CZECH R.	65%	35%
US	89%	11%		AUSTRIA	61%	39%
GREECE	88%	13%		FRANCE	55%	45%

2.2: CULTURAL PRESERVATION *VS.* ISOLATION

Nearly 9 in 10 global Prosumers make a conscious effort to learn about the cultures and habits of communities to which they do not belong. A debate has risen in recent years, however, about where the line exists between cultural appreciation and cultural appropriation. For the most part, respondents favor cultural interchanges more than they fear inappropriate borrowing. Still, it is a thorny issue to navigate, as Gucci **discovered** when it designed and sold a Sikh-style turban as a fashion accessory. And attitudes are shifting, as seen in the fact that 21% of Gen Zs, compared with 15% of boomers, think cultural borrowing is disrespectful.

Minority communities are so self-centered that they ignore the most pressing universal issues facing the world

43%

PROSUMERS

I worry about communities becoming radicalized

65%

PROSUMERS

(% agreeing strongly/somewhat)

I make it a point to better understand other communities by learning about their cultures and habits

86% PROSUMERS

68% MAINSTREAM

Which comes closer to your point of view?
(Choose one / showing Prosumers)

I think it is **disrespectful** to borrow culture from a community to which one does not belong

13%

I think it is **good** to appreciate and borrow from the cultures of communities that aren't our own
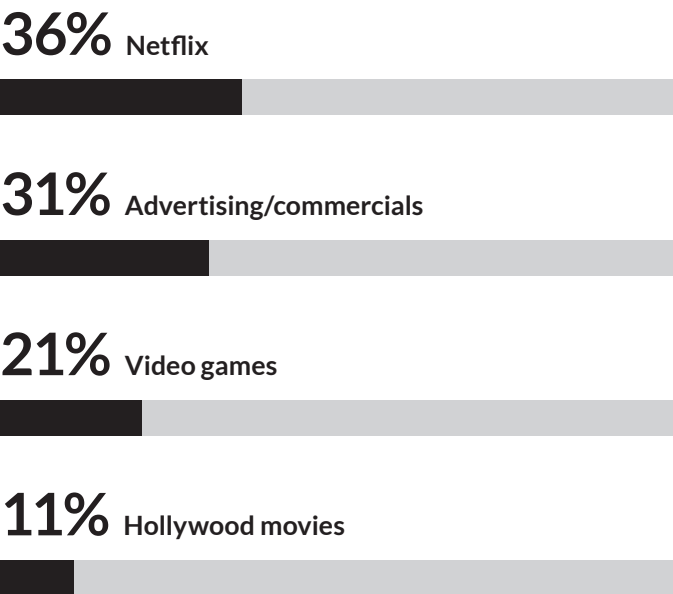
87%

2.3: POP CULTURE *AND* REPRESENTATION

As people seek to explore communities beyond their own, pop culture provides a vital pathway, especially for Prosumers and younger generations. Even the customs and characteristics of traditionally closed-off communities such as **ultra-Orthodox Jews** are being streamed into homes via fictional depictions. While the Hollywood elite continue to **draw criticism** for their films' lack of representation, streaming pioneer Netflix is applauded for its inclusivity. Advertising, too, is seen as promoting diversity and inclusion. A prime example: Disney's **#FromOurFamilyToYours** short film centered on multiple generations of a Filipino family. That said, 44% of Prosumers—rising to 78% in China—do not believe their communities are adequately or accurately represented in the media.

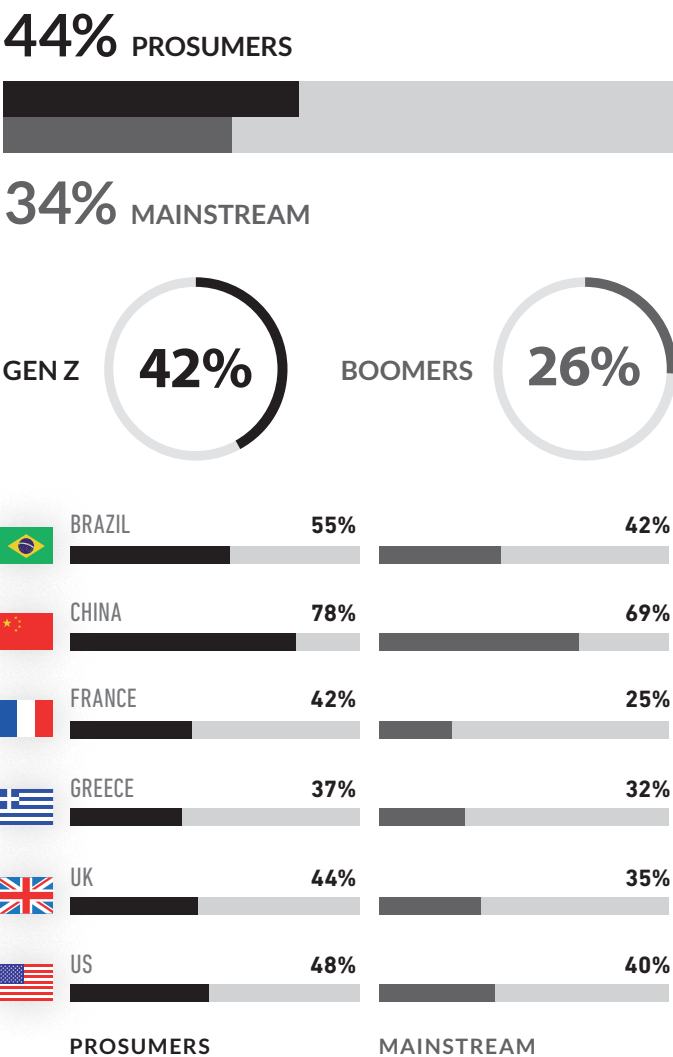**I have learned about communities that are different from mine through pop culture**

72% PROSUMERS

48% MAINSTREAM

GEN Z **64%**　　BOOMERS **34%**
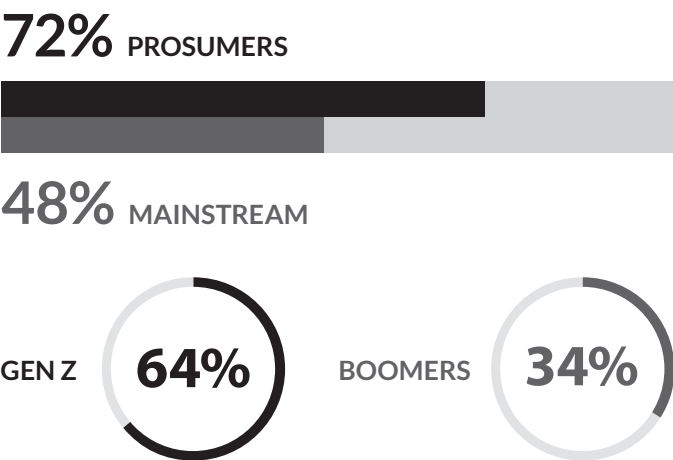
Which source do you feel best represents a diverse audience? (showing Prosumers)

36% Netflix

31% Advertising/commercials

21% Video games

11% Hollywood movies

I feel my community is not adequately or accurately represented in the media

44% PROSUMERS

34% MAINSTREAM

GEN Z **42%**　　BOOMERS **26%**

		PROSUMERS	MAINSTREAM
🇧🇷	BRAZIL	55%	42%
🇨🇳	CHINA	78%	69%
🇫🇷	FRANCE	42%	25%
🇬🇷	GREECE	37%	32%
🇬🇧	UK	44%	35%
🇺🇸	US	48%	40%

(% agreeing strongly/somewhat)

3. Lessons for Brands

Diversity and inclusion aren't just matters for C-suite discussions. More than 8 in 10 Prosumers think it's important for brands to represent a broad spectrum of communities in their advertising. Moreover, 30% have boycotted a brand that fails to support a particular community. It can be a complex issue, however, with nearly as many global Prosumers (28%) having boycotted a brand for supporting a community with which they disagree.

I think it is important for brands to represent many different communities in their advertisements

82% PROSUMERS

67% MAINSTREAM

I have boycotted a brand that failed to support a community I belong to or care about (showing Prosumers)

30%

I have boycotted a brand that supports a community with which I disagree
(showing Prosumers)

28%

(% agreeing strongly/somewhat)

Brands also face pushback when consumers question the sincerity of their efforts—a response that's especially prevalent among younger generations. Around 4 in 10 Prosumers often find it disingenuous when brands take a position on a community concern. We have seen this, for instance, with regard to **Pride Month** and the **Black Lives Matter** movement, with multiple brands across industries accused of performative activism or "brandwashing."

When brands take a position on a community concern, I often find it disingenuous

GEN Z
43%

BOOMERS
33%
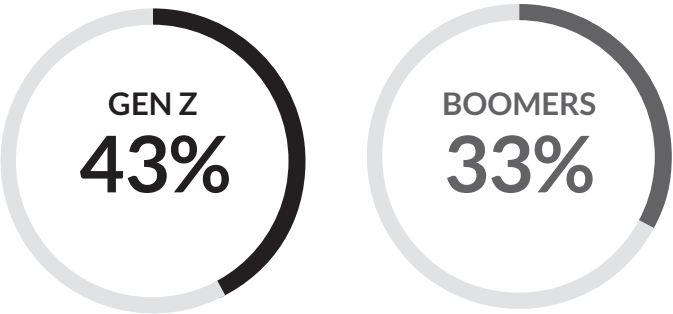
ACTIONS SPEAK LOUDER THAN WORDS

Words mean little in the absence of action. Accordingly, more than three-quarters of global Prosumers say it's imperative for brands to follow up statements on community issues with concrete deeds. The media are rife with examples of companies that have publicly professed one position while **failing** to live up to their claims or even **privately supporting** the other side.

Publicly acknowledging that it had failed to be a strong ally to the Black community, footwear and apparel brand Vans outlined **several commitments** to support equity and justice for marginalized communities. These commitments include diverting money from Vans' #StopHateForProfit campaign and store window displays to invest it directly in the Black community across the US; ensuring that at least 50% of artists and ambassadors cast and collaborated with in global campaigns are people of color; and expanding relationships with historically Black colleges and universities (HBCU) to ensure a stronger pipeline of minority candidates into the company.

Prosumers (78%) also want larger brands to address inequities by supporting small businesses owned by members of marginalized communities. Online platforms such as Beyonce's **The Black Parade Route** and **Women Owned** make this easier by channeling buyers to sellers from communities they want to support.

Large companies should make an effort to support small businesses owned by people from marginalized communities

78% PROSUMERS

63% MAINSTREAM
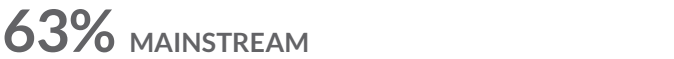
When brands take a position on a community concern, it is imperative that they follow it up internally and externally with concrete actions

78% PROSUMERS

61% MAINSTREAM

(% agreeing strongly/somewhat)

External actions must be backed up by internal policies. Around 3 in 4 Prosumers think it should be mandatory for large companies to have a diverse leadership committee and to have a DEI (diversity, equity, and inclusion) expert on that committee.

It should be mandatory for large companies to have a diverse leadership committee

72% PROSUMERS

56% MAINSTREAM

All brands and corporations should have a diversity and inclusion expert on their leadership committee

77% PROSUMERS

61% MAINSTREAM

AUTHENTICITY REQUIRED

Representation can be a minefield. In recent years, **Dolce & Gabbana** has been accused of racism for a series of ads depicting a Chinese woman struggling to eat Italian food with chopsticks, and **Samsung** succumbed to pressure to stop airing an ad featuring a drag queen following a backlash in socially conservative Singapore. It can be especially challenging not to be seen as turning one's back on a particular community—e.g., those who are LGBTQ+—for fear of offending specific populations.

Global brands should pay more attention to cultural differences so they do not offend anyone

81% PROSUMERS

68% MAINSTREAM

There is also the issue of how best to amplify the voices of marginalized communities (an expectation of 41% of Prosumers) without appearing to hijack the cause for profits or inappropriately lay claim to the culture. And it's vital that a brand not be perceived as aligning itself with a culture while at the same time mistreating, misrepresenting, or devaluing its members. Four in 10 global Prosumers—and more than 6 in 10 in China—often feel stereotyped by brand depictions of their communities.

With its **Widen the Screen** initiative, Procter & Gamble is investing in content creation, talent development, and platforms that empower creators to tell the story of the Black experience in all its richness.

I expect brands to amplify the voices of marginalized communities

41% PROSUMERS

29% MAINSTREAM

Another labyrinth to navigate: catering to community needs without making customers feel stereotyped or condescended to. While a slight majority of global Prosumers (53%) expect brands to design products and services specific to the needs of particular communities, 72% prefer to buy brands that are targeted to a broad audience. This is similar to the age-based branding conundrum revealed in an **earlier Prosumer Report**.

When brands seek to represent my community, I often feel it is stereotypical

43% PROSUMERS

35% MAINSTREAM

(% agreeing strongly/somewhat)

I expect brands to design products and services tailored to the specific needs of communities
(showing Prosumers)

53%

HOWEVER:

I prefer to buy brands that...
(Choose one / showing Prosumers)

...are not targeted at any one community

72%

...specifically target people in my community

28%

One potentially safer option: serving as an intermediary. Around 6 in 10 Prosumers expect brands to build bridges between communities and the broader public. Created with the blessing of the Friends of Dakota tribe, Pharrell Williams' **Humanrace Sic̆hona** sneakers (adidas) were marketed with an "I am Dakota, we are Dakota" campaign shot and directed by indigenous artists and starring members of the Dakota Native American tribe.

PepsiCo water brand LIFEWTR also devised a creative way to connect consumers to other cultures. For its **Life Unseen** campaign, the brand commissioned 20 artists from groups underrepresented in the creative community to create packaging designs. An accompanying study explored the problem of exclusion and underrepresentation across art, fashion, music, and film.

I expect brands to build bridges between communities and the broader public

59% PROSUMERS

46% MAINSTREAM

IN A NUTSHELL

1. Communities preserve and defend cultures against the relentless homogenization of globalization.

2. When institutions seem to be falling apart, communities have become a critical platform for action.

3. Communities empower their members to speak up and fight for their rights.

4. The increased power and presence of communities raises new tensions around universalism and representation.

5. While expected to demonstrate support, brands must proceed with caution and authenticity, providing tangible evidence that their actions match their words and skillfully navigating sensitivities around stereotyping and cultural mores.

About the Study

In the first quarter of 2022, Havas partnered with Market Probe International to survey 14,600 people ages 18+ in 30 markets: Africa Bundle (Ivory Coast, Kenya, Nigeria), Argentina, Austria, Brazil, Canada, China, Colombia, Czech Republic, Denmark, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Mexico, Peru, the Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, Spain, the United Arab Emirates, the United Kingdom, and the United States.

The survey sample was made up of **20%** leading-edge **Prosumers**
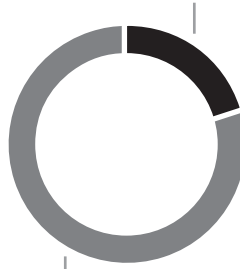
and **80% mainstream** consumers.

Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for nearly 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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