

A NEW ERA OF EXPECTATION

UNDERSTANDING THE RISE OF HEALTHCARE SCEPTICISM,
MISINFORMATION, AND TRUST DYNAMICS TO ENHANCE
BELIEF IN ADULT IMMUNISATION

APRIL 2025



INTRODUCTION & PROJECT SCOPE

The Global Listening Project (GLP)

In summer 2023, The GLP conducted a 70-country survey to measure how public trust in governments and health policies had been affected by the COVID-19 pandemic, to ultimately drive policymaker understanding about what it takes to build resilient societies and prepare for crises.

GSK and Adult Immunisation

GSK partnered with The GLP to explore this dataset and identify insights that can help inform future strategies to support belief in adult immunisation, also coordinating a global health expert panel discussion on the results using swarm-AI technology. These findings are designed to start conversations with policy audiences on driving belief in adult immunisation.

RESEARCH METHOD

Method	Quantitative survey
Sample	1,000 gen pop per country representative for age, gender and region
Geography	70 countries across Europe, North America, South America, Asia, Africa and Australia This analysis focusses in on four priority countries: US, UK, Germany, Japan
Timeframe	July 2023 – August 2023
Data	Full dataset: https://global-listening.org/societal-preparedness-insights/



SUMMARY FINDINGS

A PANEL OF GLOBAL HEALTH EXPERTS HAVE VERIFIED AND VALIDATED THESE THREE IMPORTANT TRENDS:

1.

RISING CYNICISM AND THE FALL IN GLOBAL VACCINE CONFIDENCE

Following the COVID-19 pandemic, vaccine confidence has fallen in 9 out of 10 countries worldwide, reflecting a broader trend of increasing cynicism and higher expectations of healthcare communications.

2.

FALLING TRUST AND THE COMPLEX INFORMATION ECOSYSTEM

Trust in traditional authority figures is low, and the diversification of information sources coupled with the widespread use of social media allows for potential misinformation to spread.

3.

THE SEARCH FOR RELEVANCE AND RELATABILITY

The age of the expert is not over. People value relatable, peer-endorsed information, and they want to hear from the right expert at the right time – actively using a broad range of channels for information and connectivity.

WE SHARE THESE RESULTS TO INSPIRE CONVERSATION AND SOLUTION IDEATION TO ADDRESSING SCEPTICISM AND MISINFORMATION, INCREASING TRUST, AND WORKING TOGETHER TO BOLSTER BELIEF IN ADULT IMMUNISATION

SUMMARY CONCLUSIONS

“We all feel that things are worse, and **now we have the evidence!** It should trigger us to think about what we can do. But this report alone will not work, **it should be combined immediately with an action plan for government officials**”

- Policy influencer, Germany

EXAMPLE SOLUTIONS TO DRIVE BELIEF IN ADULT IMMUNISATION



Prioritise and mobilise local doctors; incentivise their conversations with patients



Visible scientist + policymaker collaboration outside a crisis to increase trust



Diverse & personalised communications, including a range of voices and channels to reach everyone



Include peers and local influencer networks in communications campaigns



Involve social scientists in communication strategies to centre human understanding

QUESTION FOR DISCUSSION: WHAT ELSE HAVE YOU DONE / ARE YOU PLANNING / COULD YOU DO?

DETAILED FINDINGS



1. RISING CYNICISM AND THE FALL IN GLOBAL VACCINE CONFIDENCE

SECTION 1 SUMMARY

RISING CYNICISM AND THE FALL IN VACCINE CONFIDENCE



Post-COVID-19, there has been a decline in vaccine confidence, reflecting a more cynical and investigative approach to health decisions and higher expectations of healthcare communications.



This trend is especially pronounced in countries with robust healthcare systems, where safety concerns dominate public discourse and are driving people to seek more information.



The questioning of vaccines occurs across demographics, but the trends are not even – with youth, women and those with lower education levels standing out as the most sceptical.

SINCE THE COVID-19 PANDEMIC, 90% OF COUNTRIES HAVE SEEN A DECLINE IN STRENGTH OF BELIEF IN SAFETY OF VACCINES

CHANGE IN BELIEF IN SAFETY OF VACCINES 2015-2019 MEAN VS. 2023

(Change in percentage points of general population who **strongly agree** vaccines are safe)



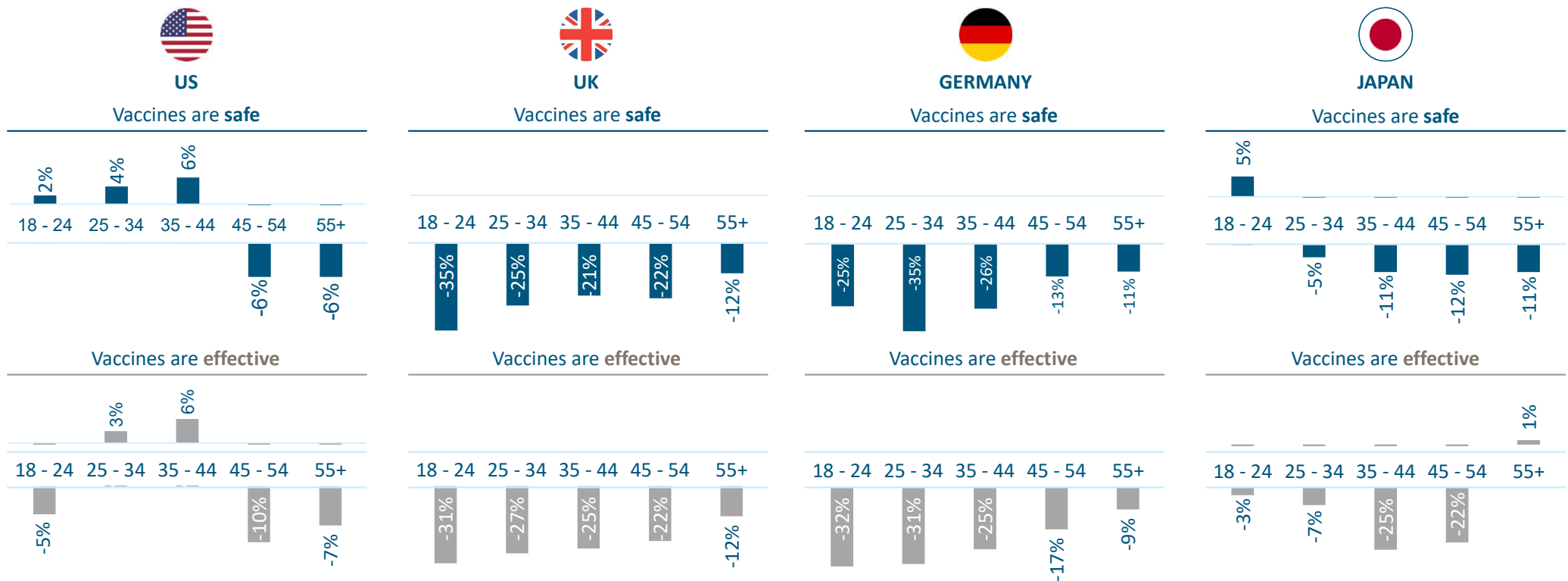
Source: The Global Listening Project, 2023; The Vaccine Confidence Project, 2015 - 2019.
 Q. How strongly do you agree or disagree with each of the following statements about vaccines in general? (Strongly agree only)
 Base: General population (The Global Listening Project: c. 1,000 respondents per country; The Vaccine Confidence Project)

Priority countries

THE DECLINE IN PERCEPTIONS OF VACCINE SAFETY AND EFFICACY IS PRESENT ACROSS AGE GROUPS

CHANGE IN BELIEF OF VACCINES 2020 VS. 2023 BY AGE GROUP IN PRIORITY COUNTRIES

(Change in share of respondents who net agree)



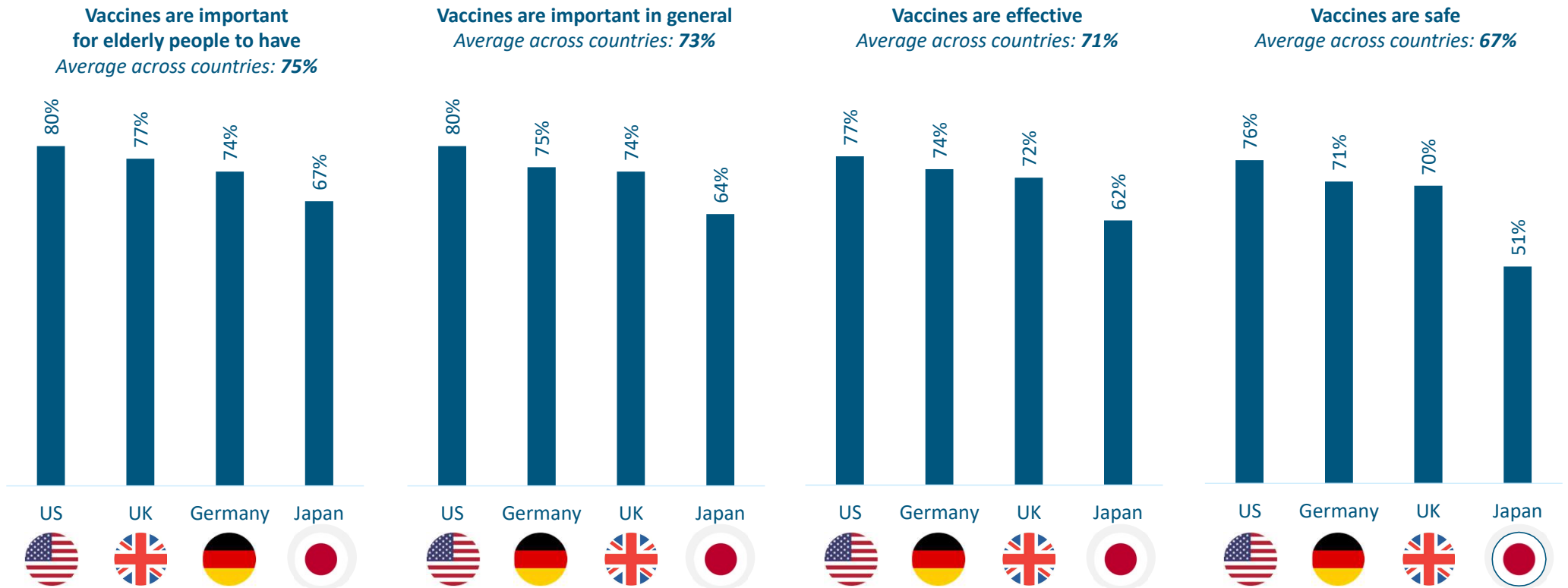
Source: The Global Listening Project, 2023; The Vaccine Confidence Project, 2020.

Q. How strongly do you agree or disagree with each of the following statements about vaccines in general? (Somewhat and strongly agree)

Base: General population (The Global Listening Project: c. 1,000 respondents per country; The Vaccine Confidence Project: c. 1,000 respondents per country). Age breakdowns in line with each market population.

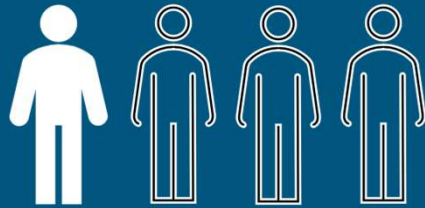
VACCINE CONFIDENCE LEVELS VARY ACROSS THE US, UK, GERMANY AND JAPAN, WITH SAFETY A CONSISTENT AREA OF CONCERN

VACCINE BELIEFS ACROSS PRIORITY COUNTRIES (% AGREE)



Source: The Global Listening Project, 2023.
 Q. How strongly do you agree or disagree with each of the following statements about vaccines in general? (Somewhat and strongly agree)
 Base: General population (c. 1,000 respondents per country)

1 IN 4 PEOPLE CURRENTLY QUESTION VACCINE SAFETY, INCLUDING 26% OF PEOPLE 55+



1 in 4

people (28%) currently question vaccine safety including 26% of people 55+ who are at increased risk

US

24%

(24% among 55+)

DE

29%

(20% among 55+)

UK

30%

(19% among 55+)

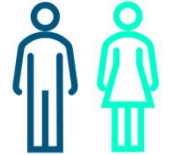
JP

49%

(40% among 55+)

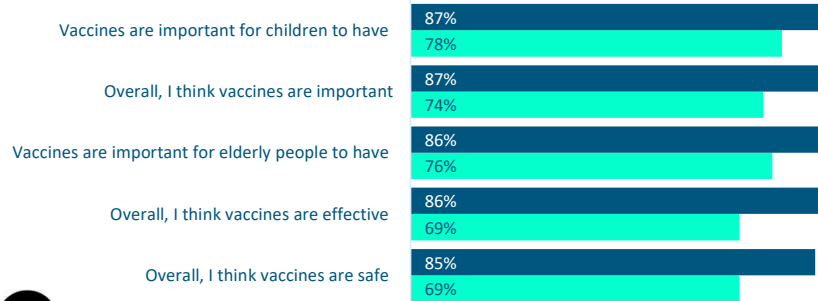
THE DEMOGRAPHIC PATTERNS OF TRUST IN VACCINES ARE VARIABLE, WITH WOMEN MORE CRITICAL OF VACCINES THAN MEN

VACCINE CONFIDENCE ACROSS PRIORITY COUNTRIES (By gender)



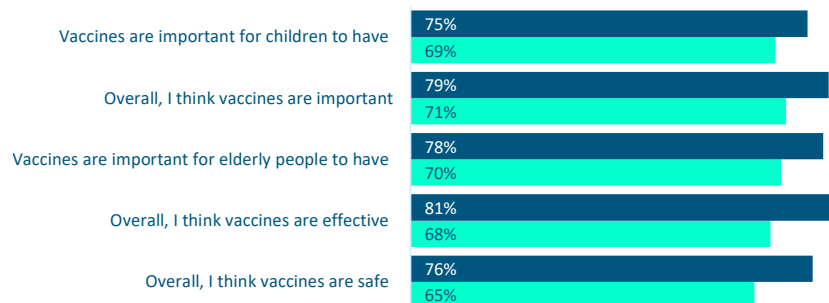
US

On average **13%** difference in agreement levels between genders



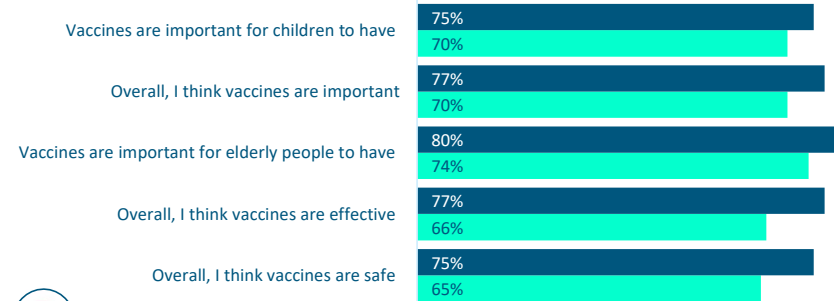
GERMANY

On average **9%** difference in agreement levels between genders



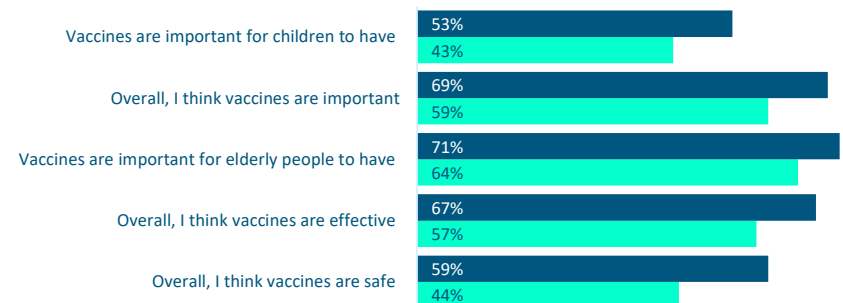
UK

On average **8%** difference in agreement levels between genders



JAPAN

On average **24%** difference in agreement levels between education levels



Source: The Global Listening Project, 2023

Q. How strongly do you agree or disagree with each of the following statements about vaccines in general? (Somewhat and strongly agree)

Base: General population (The Global Listening Project: c. 1,000 respondents per country). Gender breakdowns in line with each market population.

THOSE WITH A LOWER LEVEL OF EDUCATION ARE MORE CRITICAL OF VACCINES THAN THOSE WITH A HIGHER LEVEL OF EDUCATION

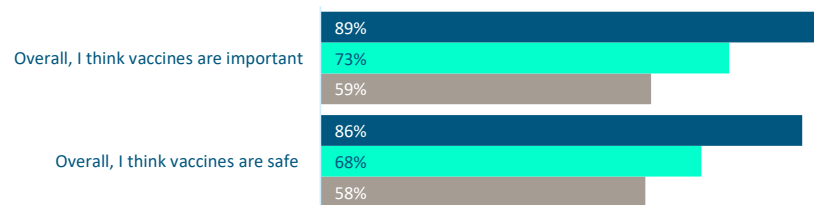
TRUST IN VACCINES ACROSS PRIORITY COUNTRIES (By educational attainment)

PRIMARY OR BELOW
SECONDARY/VOCATIONAL
UNIVERSITY+



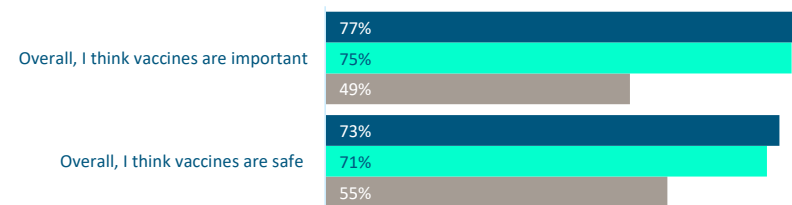
US

On average **29%** difference in agreement levels between education levels



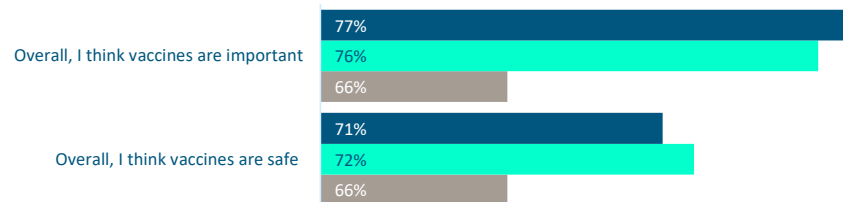
UK

On average **23%** difference in agreement levels between education levels



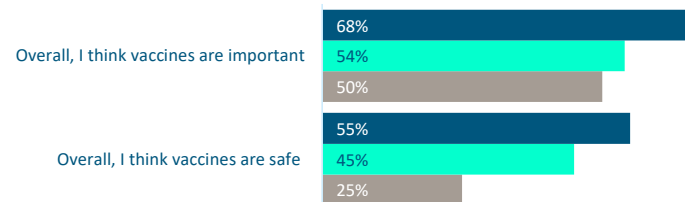
GERMANY

On average **8%** difference in agreement levels between education levels



JAPAN

On average **10%** difference in agreement levels between genders



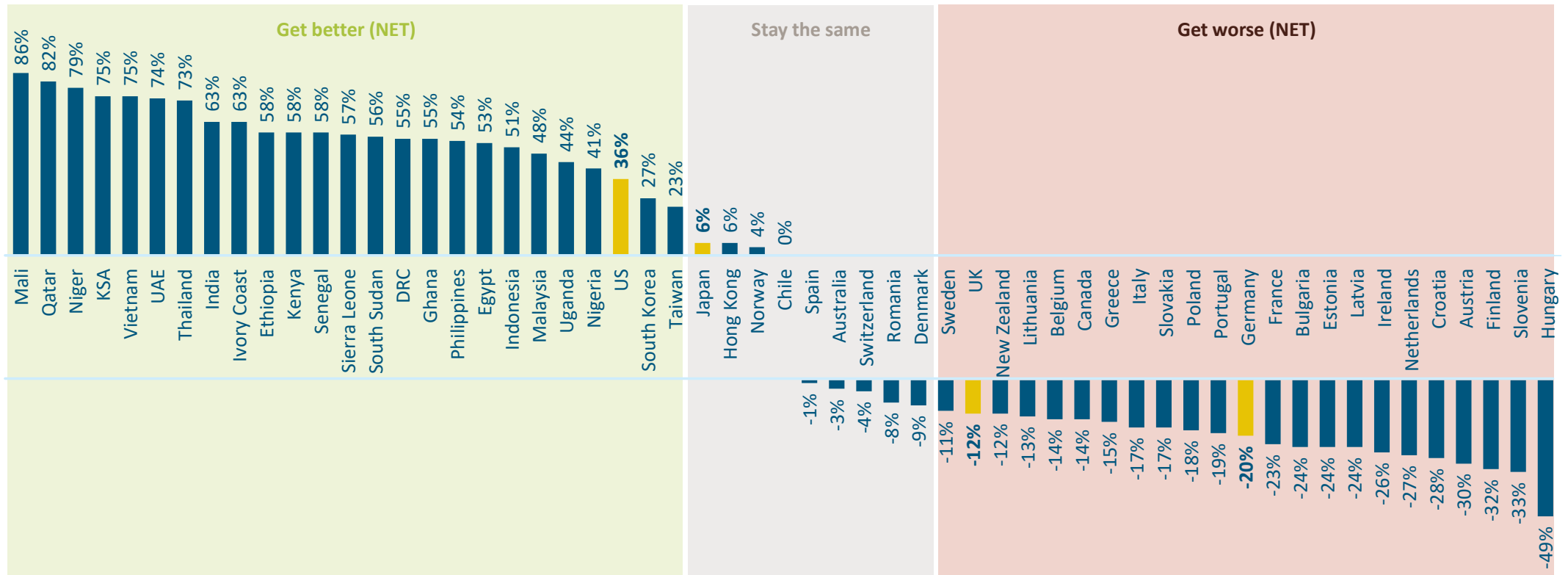
Source: The Global Listening Project, 2023

Q. How strongly do you agree or disagree with each of the following statements about vaccines in general? (Somewhat and strongly agree)
Base: General population (The Global Listening Project: c. 1,000 respondents per country). Educational attainment breakdowns in line with each market population.

HEALTHCARE SCEPTICISM EXTENDS BEYOND VACCINES: NATIONS WITH MORE ADVANCED SYSTEMS PERCEIVE THEM TO BE DECLINING

BELIEF IN THE HEALTHCARE SYSTEM IMPROVING OR WORSENING IN THE NEXT 2 YEARS

(100% being all respondents believe it will get better, -100% all respondents believe it will get worse)



Priority countries



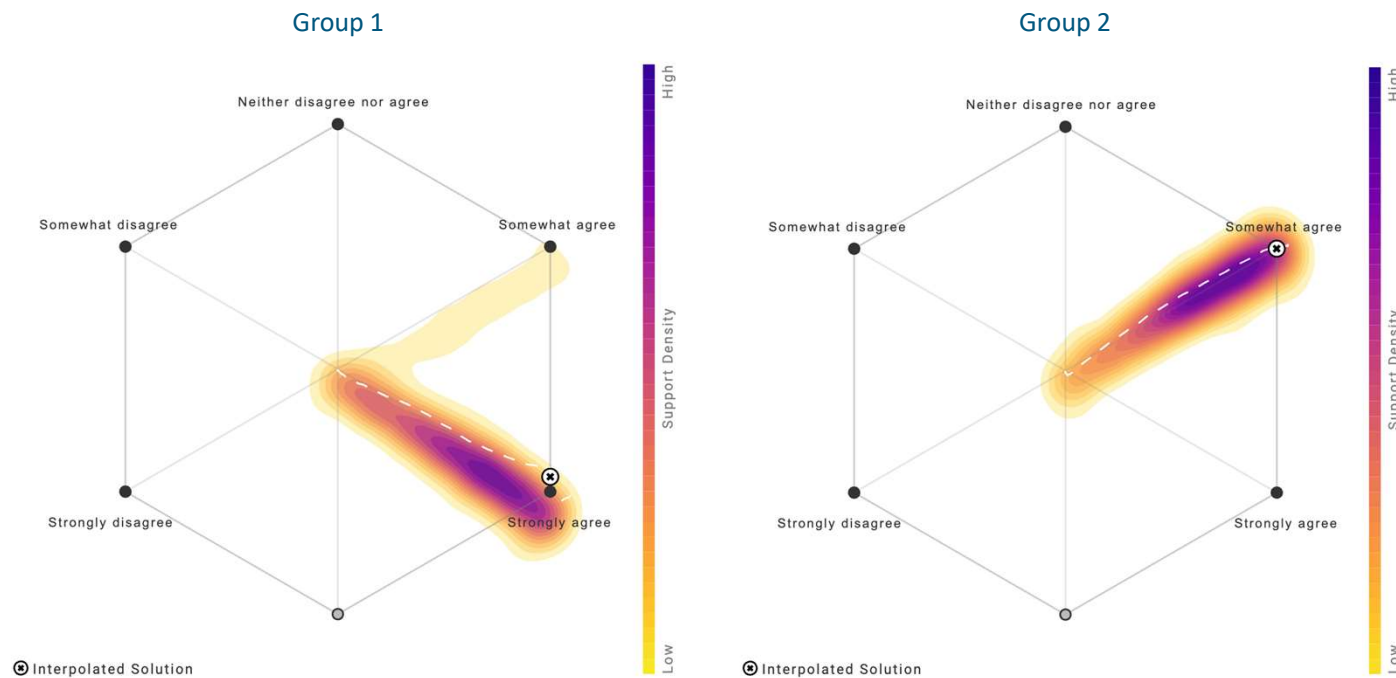
Source: The Global Listening Project, 2023

Q. In two years time, do you think that the following things in [SURVEY COUNTRY] will be better, worse, or the same as today? Healthcare systems.

Base: General population (c. 1,000 respondents per country).

GLOBAL EXPERTS AGREE THAT THE PUBLIC HAS BECOME MORE CRITICAL OF HEALTHCARE INFORMATION

GLOBAL EXPERTS' CONSENSUS THAT 'THE PUBLIC HAVE BECOME MORE CRITICAL OF HEALTHCARE INFORMATION'



“ Vaccine confidence can be **broken into trust in individual cases** (i.e. for me) where trust is high and **trust in general cases** (i.e. for general populations) where trust is low.

- Group 2, paraphrased

Understanding the results

Global experts agree or strongly agree that the public has become more critical of healthcare information.

QUESTIONS TO CONSIDER / DISCUSS:

How do you think vaccine confidence levels will change in your area in the next 5 years?

What are the risks of rising cynicism towards healthcare communications and vaccines?

How can you avoid falling immunisation rates, increasing hospitalisations and loss of productivity?



2. FALLING TRUST AND THE COMPLEX INFORMATION ECOSYSTEM

SECTION 2 SUMMARY

FALLING TRUST AND THE COMPLEX INFORMATION ECOSYSTEM



Global trust in national leaders and institutions is low, with no country choosing to first turn to government figures and politicians in crises.



This has broader repercussions: individuals distrusting authority figures tend to be more likely to have lowered beliefs that vaccines are safe.



People trust a multitude of sources during a crisis over a single source, leading to a diversely informed, or sometimes misinformed, public.



Despite low trust ratings, social media is frequently used. This includes people over the age of 55, who are then vulnerable to the spread of misinformation.

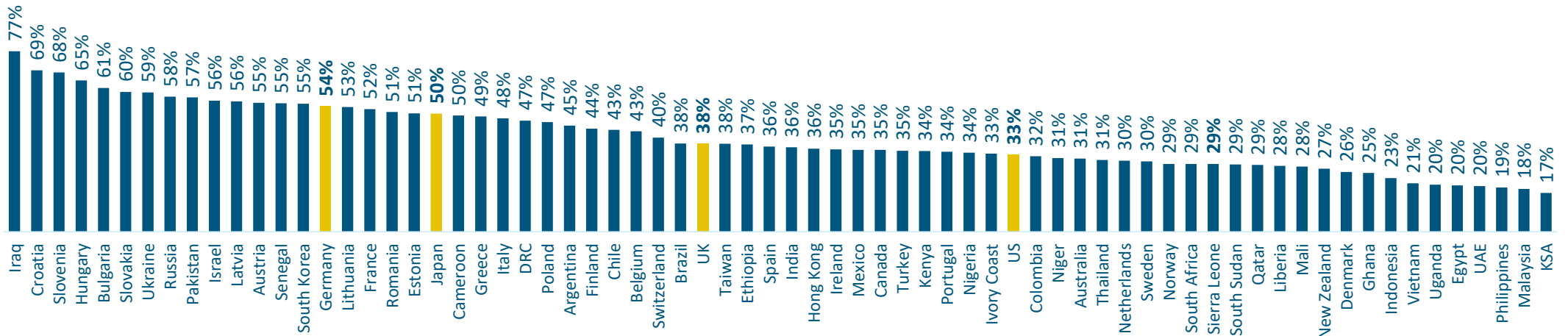


This scenario of diminished trust and diversified information sources fosters an environment ripe for misinformation and lowered vaccine confidence.

TRUST IN GOVERNMENT AND POLITICAL LEADERS IS LOW IN MANY COUNTRIES AROUND THE WORLD

0 countries reported being **most likely** to turn to government / politicians for information in a crisis (of all information sources)

% UNLIKELY TO TRUST GOVERNMENT AND POLITICAL LEADERS



Priority countries



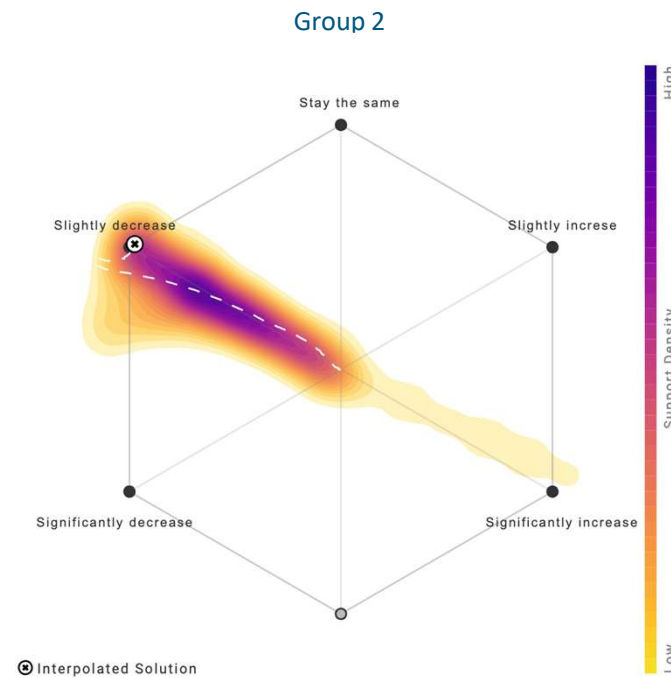
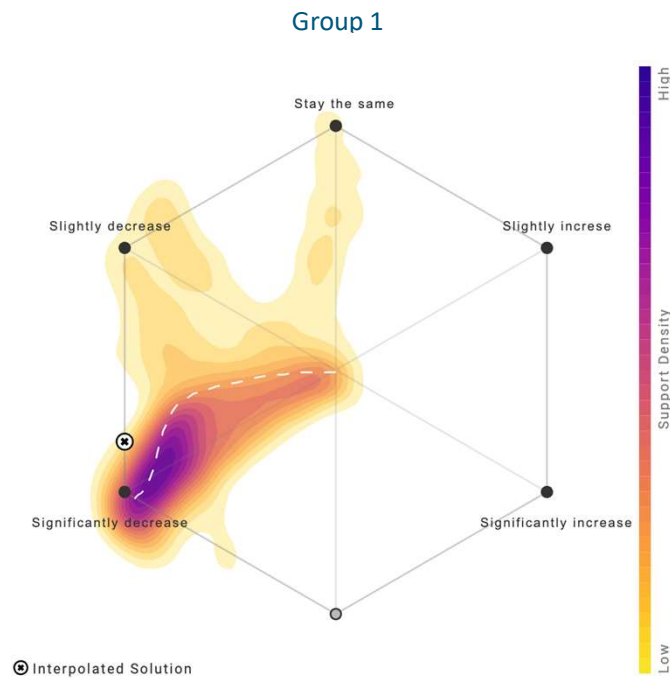
Source: The Global Listening Project, 2023

Q. Again, thinking about an emerging crisis in your country that you were very concerned about and wanted to learn more about (for example, a flood, pandemic, or food/water shortages). Who would you likely turn to for information?: Government and Political leaders (Unlikely and very unlikely)

Base: General population (c. 1,000 respondents per country).

GLOBAL EXPERTS PREDICT THAT PUBLIC TRUST IN GOVERNMENTS WILL DECLINE FURTHER IN THE FUTURE

GLOBAL EXPERTS' CONSENSUS ON PUBLIC TRUST CHANGES IN THE NEXT 5 YEARS



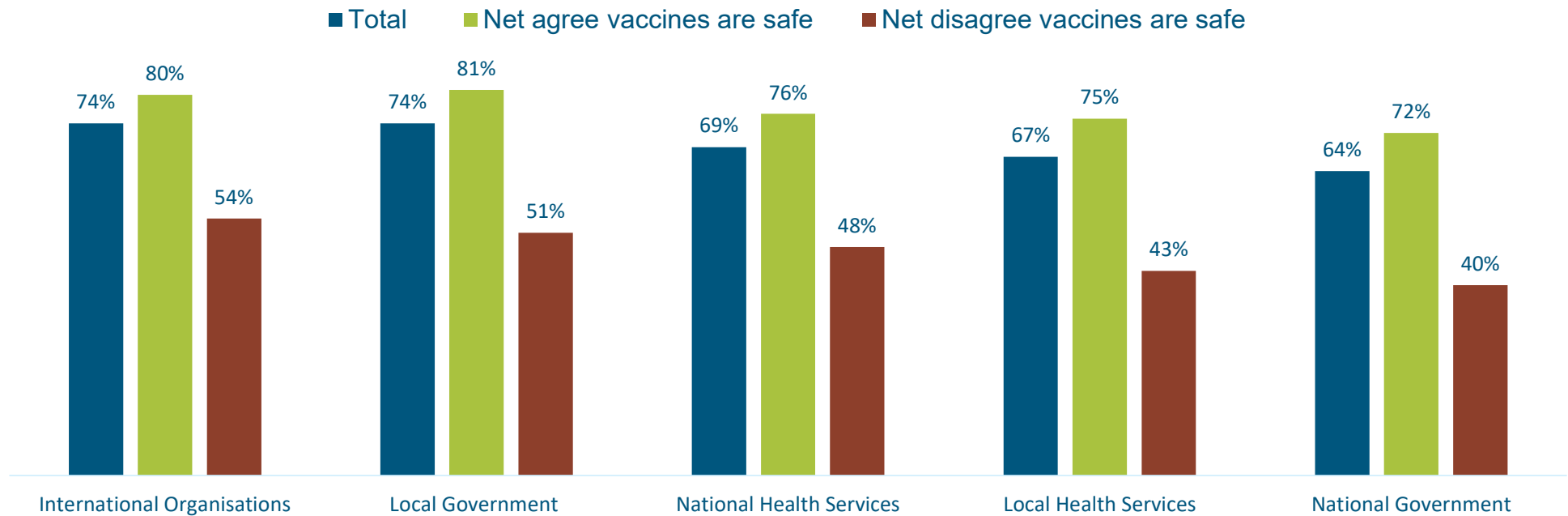
Understanding the results

More than 4 in 5 believe public trust in governments will decline further in the next five years.

TRUST IN INSTITUTIONS IS ASSOCIATED WITH TRUST IN VACCINES AMONGST PEOPLE AGED 55+

TRUST IN INSTITUTIONS BY BELIEF IN VACCINES AMONG 55+

(Priority countries combined, by agreement on vaccines' safety)



Source: The Global Listening Project, 2023

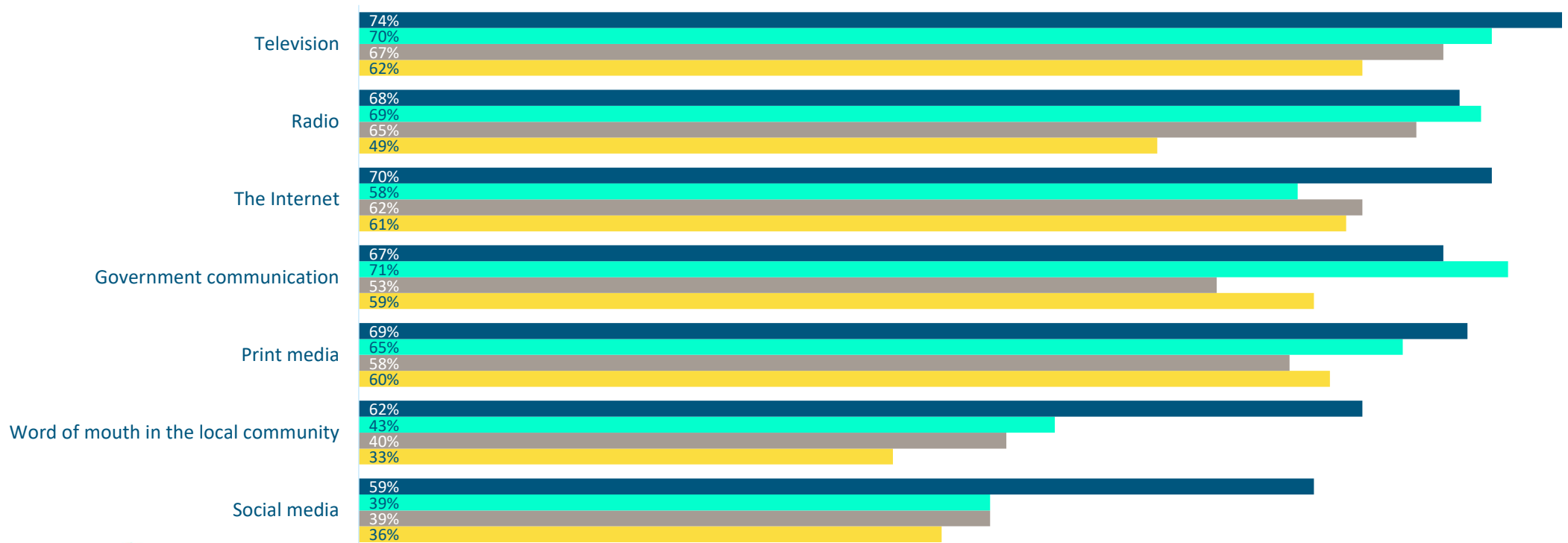
Q. How strongly do you agree or disagree with each of the following statements about vaccines in general?; Q. Imagine there was a major crisis. To what extent would you trust the following institutions to act in your best interest? (Somewhat and strongly trust)

Base: General population aged 55+ across all markets (Total: 19,289, Agree vaccines are safe: 14,109; Disagree vaccines are safe: 3,933).

GOVERNMENT COMMUNICATION IS ONE OF MANY DIVERSE INFORMATION SOURCES, ALLOWING FOR CONTRADICTING VOICES

SHARE OF POPULATION LIKELY TO TRUST THE FOLLOWING COMMUNICATION SOURCES FOR ACCURATE, TRUTHFUL INFORMATION IN A CRISIS

■ USA ■ UK ■ Germany ■ Japan



Source: The Global Listening Project, 2023

Q. Imagine there was an emerging crisis in your country that you were very concerned about and wanted to learn more about, (for example, a flood, pandemic, or food/water shortages). How likely would you be to trust the following sources to give you the most accurate, truthful information?

Base: General population (c. 1,000 respondents per country)

DESPITE LOW TRUST IN SOCIAL MEDIA DURING A CRISIS, IT IS STILL USED DAILY – EVEN BY THOSE AGED 55+

AVERAGE DAILY TIME SPENT ON DIFFERENT MEDIA CHANNELS

(By age group)

	18 - 24	25 - 34	35 - 44	45 - 54	55 - 64
Media channel most used (average time spent per day)	Social media (2h46)	Social media (2h22)	Broadcast/Linear TV (2h29)	Broadcast/Linear TV (2h43)	Broadcast/Linear TV (3h13)
Second most used media channel (average time spent per day)	Music streaming (2h34)	Broadcast/ Linear TV (2h18)	Social media (1h51)	Social media (1h24)	Broadcast radio (1h04)
Third most used media channel (average time spent per day)	Broadcast/ Linear TV (1h52)	Online TV/ Streaming (1h46)	Online TV/ Streaming (1h34)	Online TV/ Streaming (1h12)	Social media (1h03)
Fourth most used media channel (average time spent per day)	Online TV/ Streaming (1h49)	Podcasts (1h02)	Music streaming (1h28)	Broadcast radio (1h05)	Online TV/ Streaming (0h55)
Fifth most used media channel (average time spent per day)	Podcasts (0h59)	Broadcast radio (1h00)	Broadcast radio (1h07)	Music streaming (1h02)	Music streaming (0h38)



Source: GWI, 2023

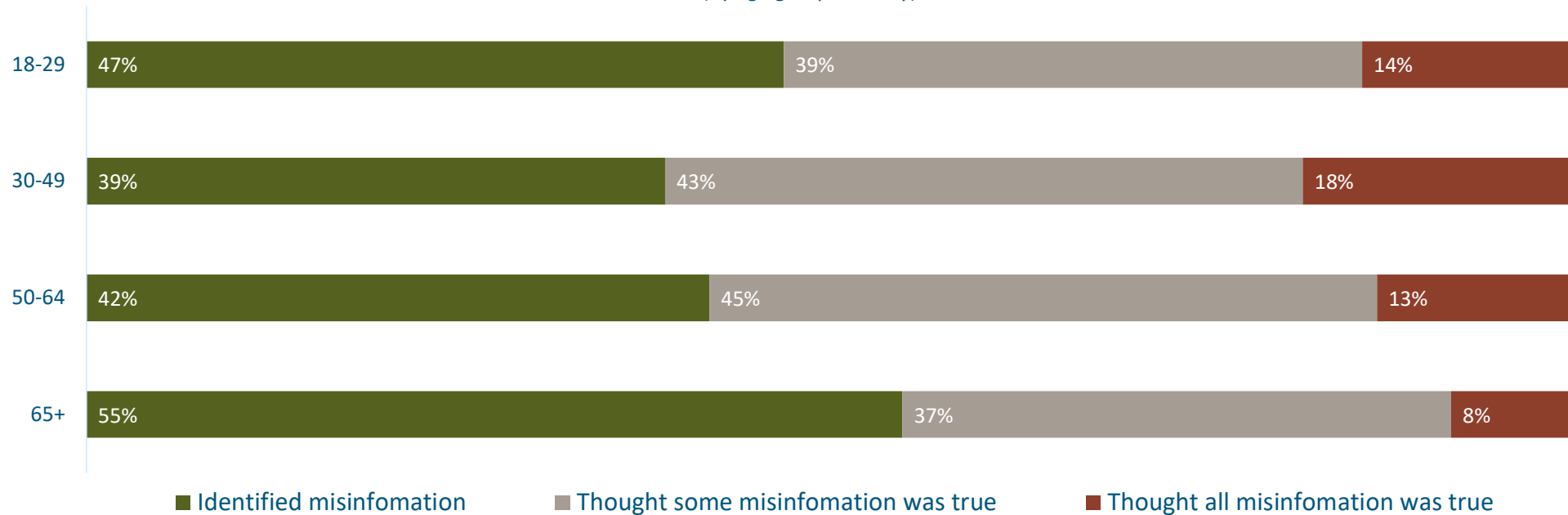
Q. How often do you visit or use these services?

Base: Influencers across Japan, Germany, the UK, and the US (18 – 24: 32,622; 25 – 34: 46,345; 35 – 44: 47,920; 45 – 54: 46,207; 55 – 64: 47,604)

RESEARCH FROM THE KAISER FAMILY FOUNDATION DEMONSTRATES ALL AGES ARE VULNERABLE TO HEALTH MISINFORMATION

PERCENT OF RESPONDENTS WHO COULD SPOT MISINFORMATION ONLINE

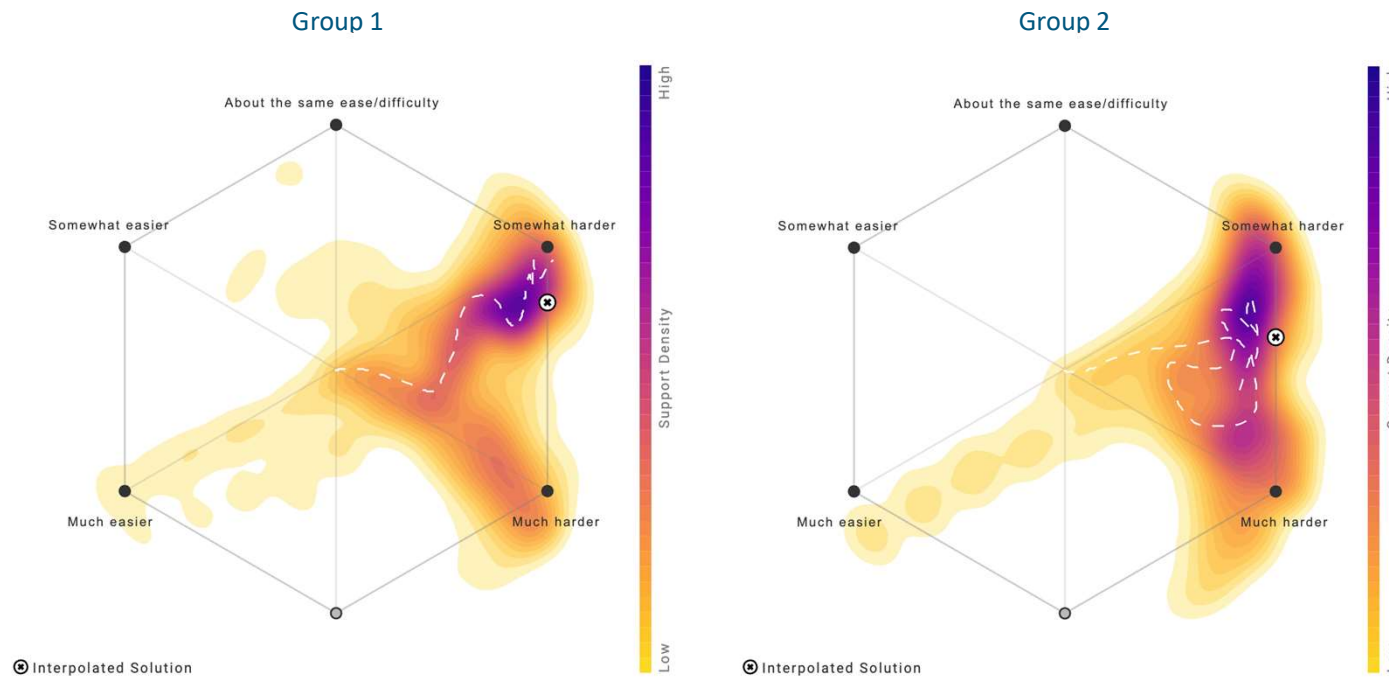
(By age group, US only)



Source: KFF Health Misinformation Tracking Poll Pilot (May 23-June 12, 2023)
Q. Do you think that it is definitely true, probably true, probably false, or definitely false that (INSERT ITEM)? Base: 2,007 U.S. adults

GLOBAL EXPERTS AGREE THAT COORDINATING EFFECTIVE PUBLIC HEALTH COMMUNICATIONS IS HARDER TODAY VS. 5-10 YEARS AGO

GLOBAL EXPERTS' CONSENSUS ON THE CHANGE OF EASE IN COORDINATING EFFECTIVE PUBLIC HEALTH COMMUNICATIONS BETWEEN TODAY AND 5 – 10 YEARS AGO



“ Some people feel overwhelmed, thinking, "I am a layperson; I can look for information but can't make sense of it." There's an increase in critical thinking but not in true confidence or competence in using that information.

- Group 2, paraphrased

Understanding the results

4 in 5 global experts believe coordinating effective public health communications has gotten harder overall.

QUESTIONS TO CONSIDER / DISCUSS:

Do you think people in your area will get better or worse at navigating complex information ecosystems in future?

Should we focus on increasing trust in government and / or prioritising alternative spokespeople for adult immunisation communications?

How have you / can you diversify the channels and spokespeople for adult immunisation communications?



3. THE SEARCH FOR RELEVANCE AND RELATABILITY



WITH A RISE IN SCEPTICISM, PAIRED WITH AN
EROSION OF TRUST IN AUTHORITY AND THE
DIVERSIFICATION OF INFORMATION SOURCES...

WHAT NOW FOR HEALTHCARE COMMUNICATORS?

SECTION 3 SUMMARY

THE SEARCH FOR RELEVANCE AND RELIABILITY



The era of the expert is not over; people just want to hear from the right expert at the right time. There is still high trust in doctors and scientists, overtaking all other experts such as community, local and national leaders.



Family and friends are equally, if not more, important than experts, especially in the identified priority countries and in people over 55. This trend emphasises the growing importance of relatable and trustworthy information.



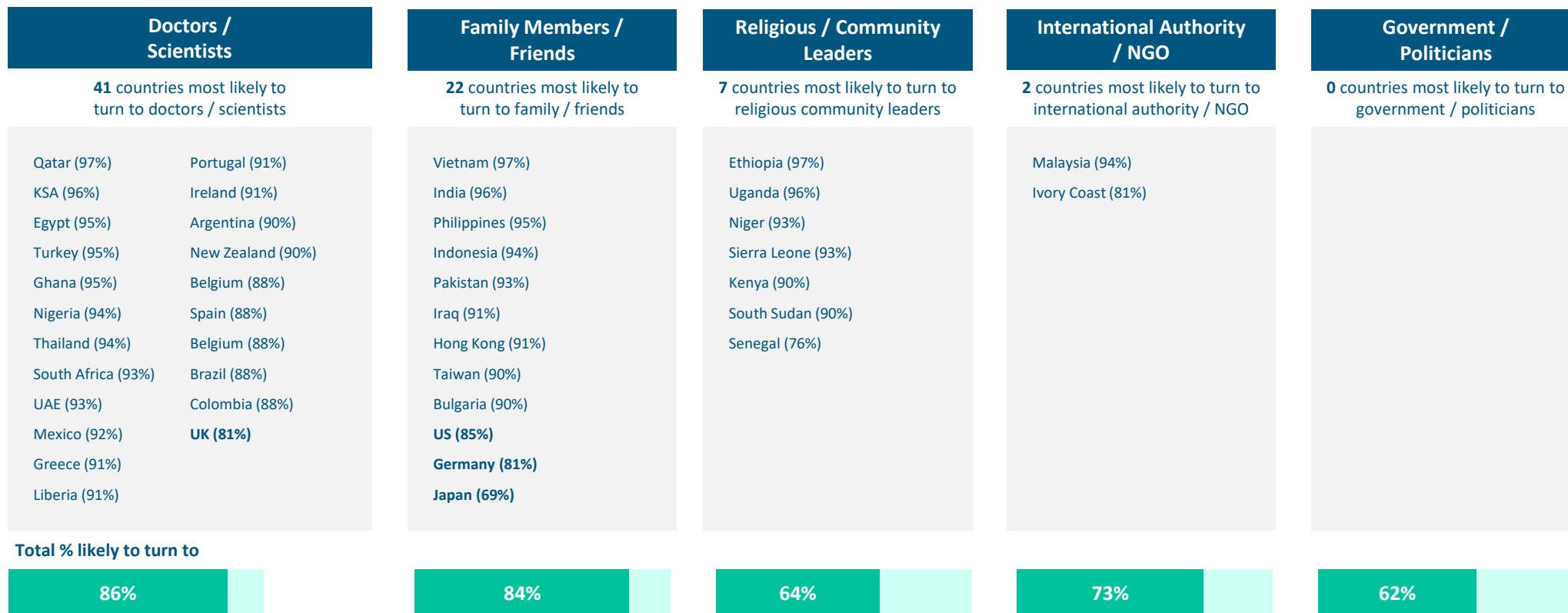
Moreover, there is a need for personal agency in the choice of information source, with people frequently using search engines and social media to tailor the information they receive.



This evolving landscape demands that information providers adapt by offering more tailored experts, more diffuse and diverse voices, and more interactive and directly relevant content to maintain trust and engagement.

IN A FUTURE CRISIS, THE GLOBAL PUBLIC WOULD TRUST VOICES THEY BELIEVE ARE KNOWLEDGEABLE ABOUT THE SITUATION

SINGLE MOST TRUSTED SOURCES OF INFORMATION IN TIMES OF A FUTURE CRISIS



Source: The Global Listening Project, 2023

Q. Again, thinking about an emerging crisis in your country that you were very concerned about and wanted to learn more about (for example, a flood, pandemic, or food/water shortages). Who would you likely turn to for information? (Likely and very likely)

Base: General population (c. 1,000 respondents per country).

MANY GLOBAL EXPERTS FAVOUR PEOPLE-FOCUSED SOLUTIONS AND BUILDING CROSS-STAKEHOLDER TRUST BEYOND CRISIS SCENARIOS

GLOBAL EXPERTS FEEDBACK

“

There is an institutional bias toward biomedical/technical answers, and **this is more about human relations.**

Social scientists need to have more influential roles in government.

- Group 1, paraphrased

“

There has been a **loss of humanness in the exchange, which makes it harder to build a sense of connection.**

We need to help individuals understand their own capacities, their ability to make choices, and to feel their own agency. This way we can build their confidence to engage with the system – **a system that is open to hearing people's concerns.**

- Group 2, paraphrased

“

My recommendation is to upgrade the interaction about vaccines during peace time so that you have a building of that trust.

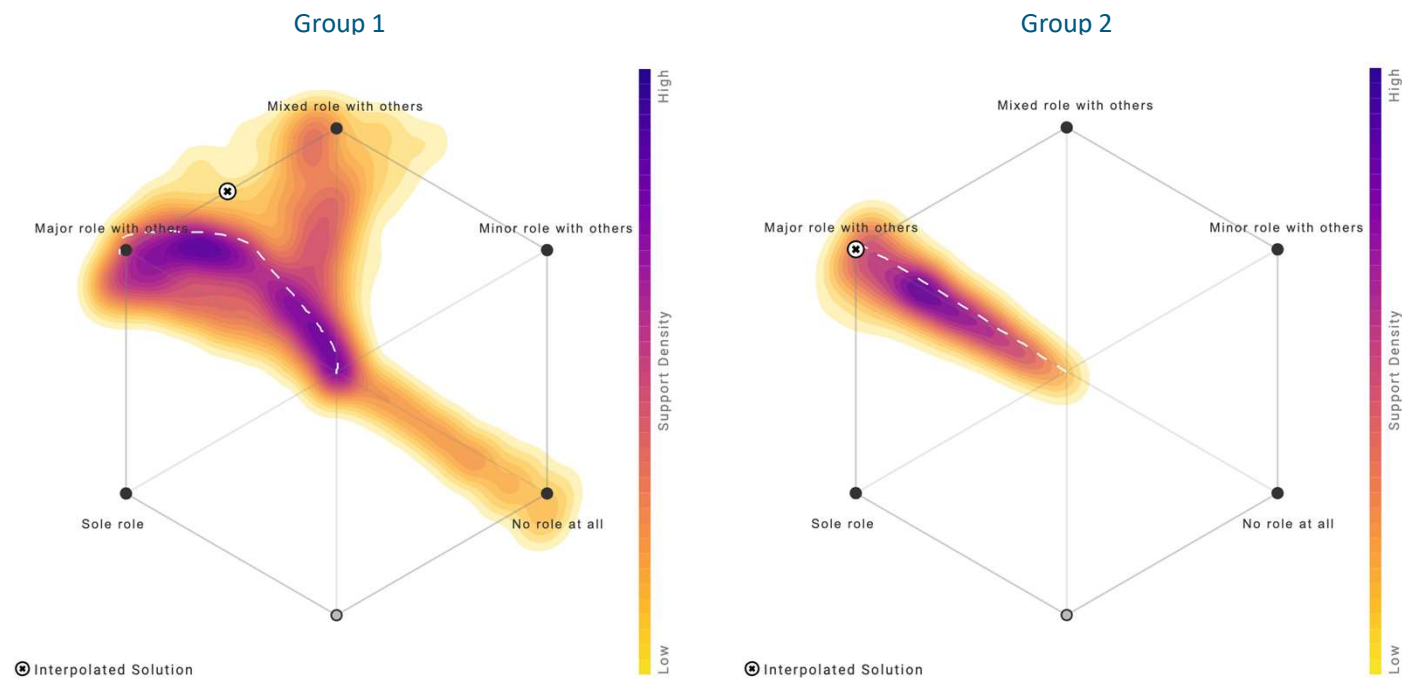
During COVID-19, people were not used to seeing scientists along with politicians, because they had never interacted before.

If they were more continuously working together during peace time, creating a feedback loop, trust would come back.... **Bottom line, peace time, politicians and scientists working together.**

- Group 2, paraphrased

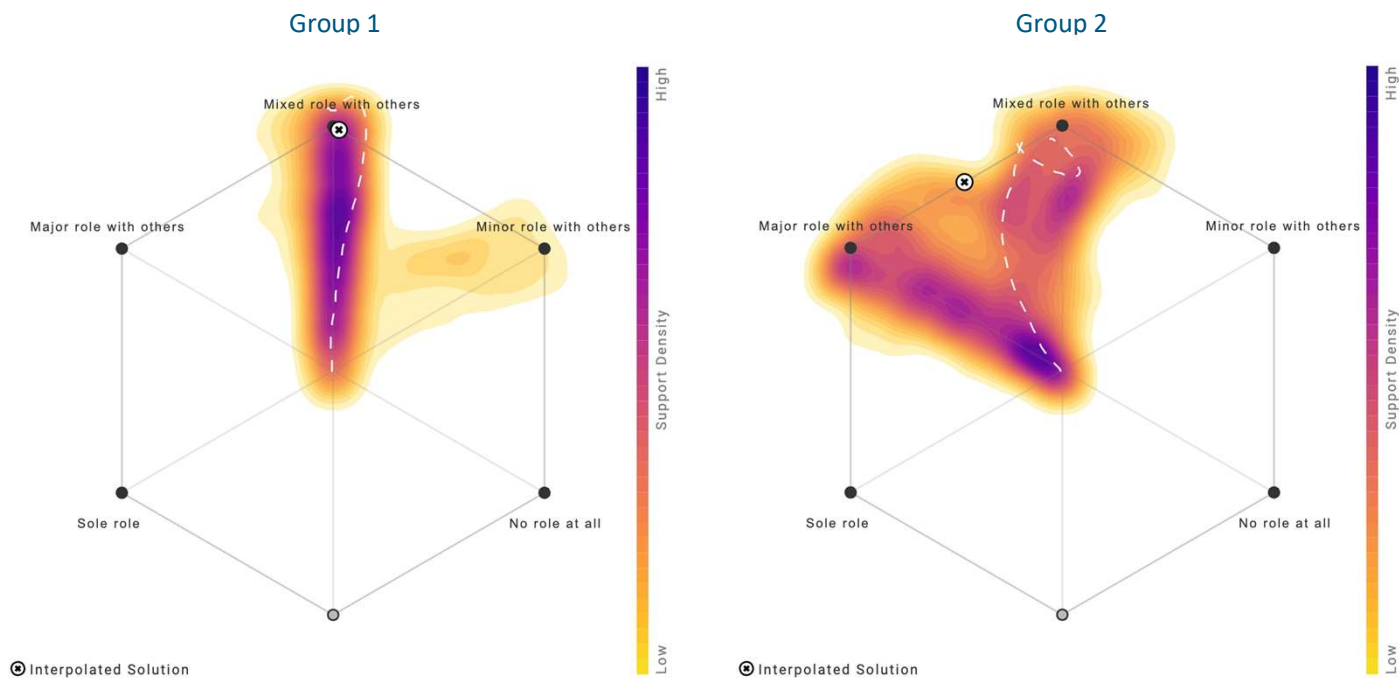
2 IN 3 GLOBAL EXPERTS WANT DOCTORS AND SCIENTISTS TO PLAY A MAJOR ROLE IN COMMUNICATING ABOUT ADULT IMMUNISATION

GLOBAL EXPERTS' CONSENSUS ON THE ROLE EXPERTS (DOCTORS, SCIENTISTS, ETC.) SHOULD PLAY IN ADULT IMMUNISATION COMMUNICATIONS



3 IN 4 GLOBAL EXPERTS ADVOCATE FOR INCLUDING FRIENDS AND FAMILY ALONGSIDE OTHERS IN ADULT IMMUNISATION COMMUNICATIONS

GLOBAL EXPERTS' CONSENSUS ON THE ROLE PEERS (FAMILY AND FRIENDS) SHOULD PLAY IN ADULT IMMUNISATION COMMUNICATIONS

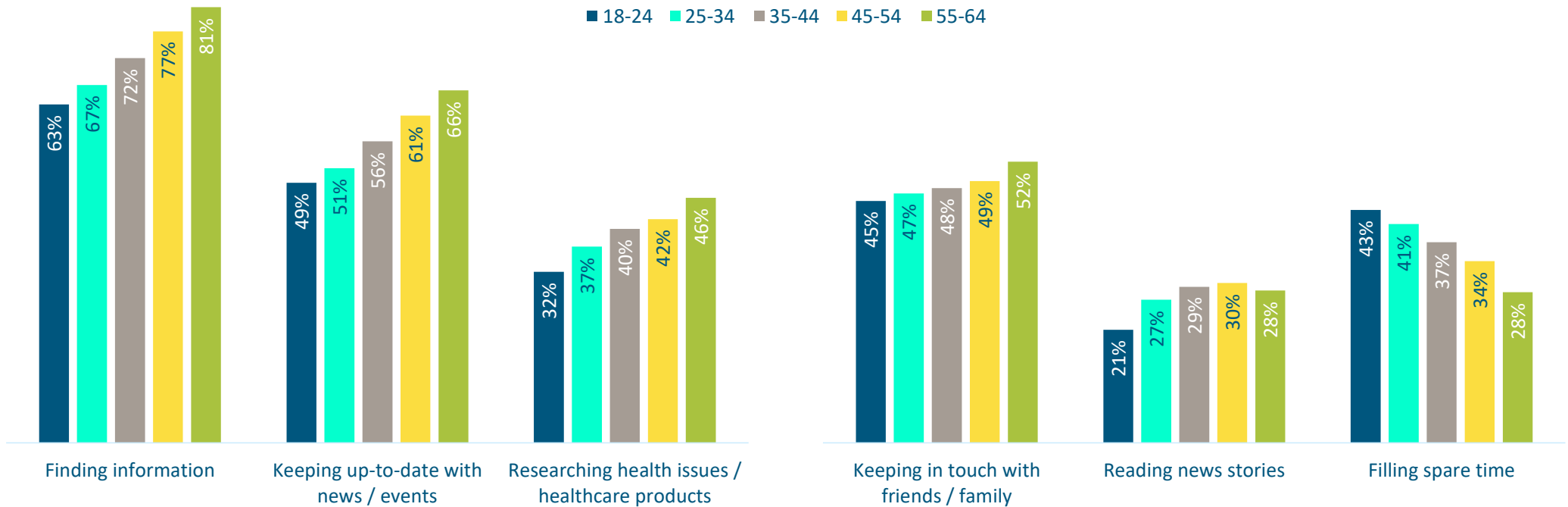


THE SEARCH FOR TRUSTED INFORMATION IS PARTICULARLY CRITICAL FOR PEOPLE 55+, SHOWN BY INTERNET AND SOCIAL MEDIA USAGE

REASONS FOR USING THE INTERNET
(By age group)

REASONS FOR USING SOCIAL MEDIA
(By age group)

■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64



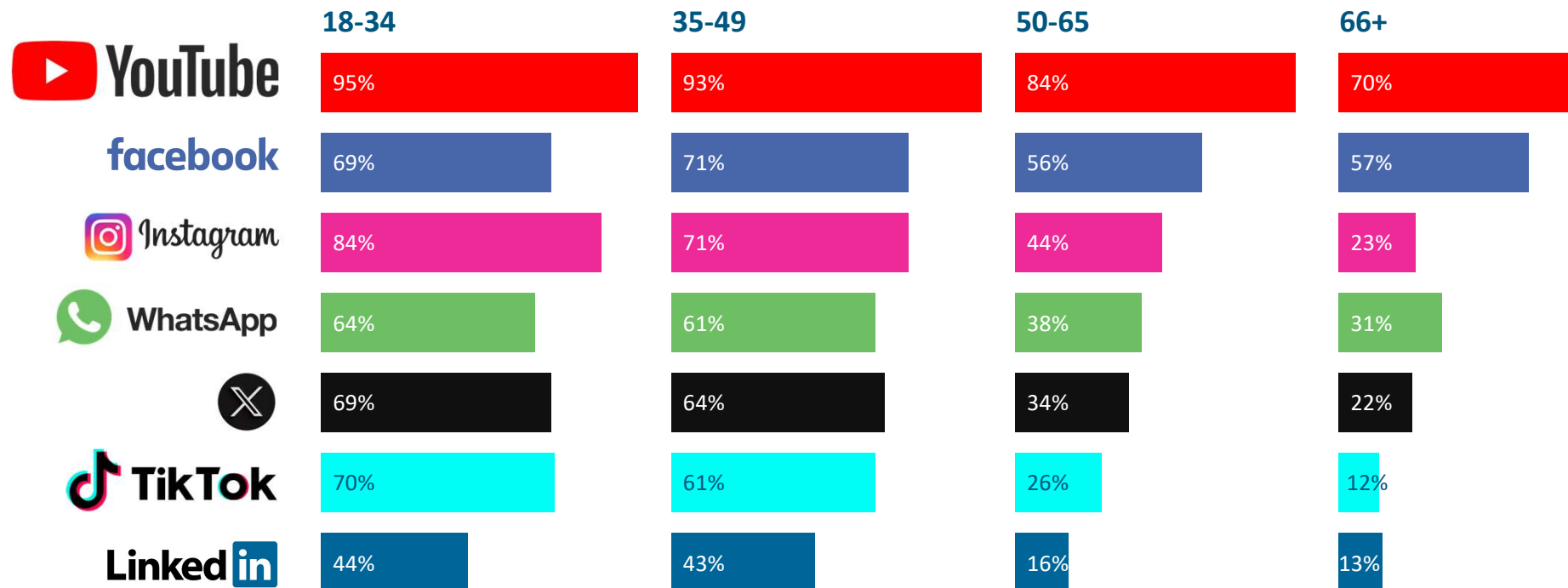
Source: GWI, 2023

Q. Which of these things are important reasons for you using the internet?; Q. What are your main reasons for using social media?

Base: Influencers across Japan, Germany, the UK, and the US (18 – 24: 7,088; 25 – 34: 8,348; 35 – 44: 6,888; 45 – 54: 5,329; 55 – 64: 3,969)

YOUTUBE AND FACEBOOK ARE THE MOST USED SOCIAL PLATFORMS AMONG AUDIENCES AGED BETWEEN 50 AND 65 IN PRIORITY COUNTRIES

SOCIAL MEDIA CHANNEL USAGE (NET EVER)
(US, JAPAN, GERMANY, BY AGE GROUP)



QUESTIONS TO CONSIDER / DISCUSS:

How can you increase or enhance the role of local doctors in adult immunisation communications?

How can you support the role of peers (friends and family) in bolstering belief in adult immunisation?

How can you embed a deeper understanding of diverse human needs in government communication strategies?



SUMMARY

KEY CONSIDERATIONS AND TAKEAWAYS

1.

DIVERSIFY COMMUNICATIONS ACROSS MESSAGES AND CHANNELS

Given that vaccine scepticism is high among specific demographics (such as women and those with lower education levels) and a wide array of informational channels are used, public health initiatives should leverage diverse communication strategies to reach audiences and address their needs and concerns. This should include a wide range of messages front by a variety of spokespeople across a multitude of channels including print and broadcast media in addition to government and social media platforms.

2.

UNDERSTAND AND SUPPORT HEALTH INFLUENCERS WITHIN CLOSE NETWORKS, FROM LOCAL DOCTORS TO FAMILY AND FRIENDS

As individuals increasingly seek trusted information from familiar faces, leveraging local doctors as a driver of belief in adult immunisation is crucial. Policymakers should explore ways to encourage and incentivise doctors to deliver accurate, relatable and timely vaccine information directly to communities. Activating peer networks, such as family and friends, can bolster belief and lead to positive action. Government officials might also consider collaborating with social scientists to foster institutional trust over the long term, maximising the impact of national and regional health initiatives.

3.

FOSTER INTERACTION AND ENGAGEMENT FOR THE LONG-TERM

In a dynamic environment where relevance and interactivity are crucial, it is essential to invest in programs that not only engage the public but also actively address their concerns and fears. By involving community members in the dialogue about vaccines and actively seeking their input, we can foster a deeper sense of trust and cooperation. This approach not only encourages belief in vaccination efforts but also transforms community members into advocates for these health initiatives. By maintaining this engagement over the long term, we ensure sustained impact and a stronger public health framework.

QUESTIONS TO CONSIDER / DISCUSS:

Do the findings from this report align with your experience?

To what extent, if at all, is this report likely to influence future decision making on health policy and communications?

How can the findings from this report be leveraged to drive meaningful change?

What recommendations would you give other policymakers based on this report to bolster public confidence in immunisation?