

Oct 2024



The Rise of the Change Makers

from Purpose to Progress

Introduction



We're a few years past the pandemic, a disruptive global event that might have previously defined life histories for many, and yet in just a few short years, it is already being superseded by more change and disruption for people. For many, living in 2024 feels like living in a state of constant change and crisis—the only way to survive is to adapt. Climate change persists, and escalates. AI is being touted as a threat to every job going or the panacea to all industries' woes—depending on who you speak to.

Wars continue in Europe, distorting energy and commodity prices. And violence is escalating in the Middle East. The cost of living continues to grow. Social mobility is becoming harder than ever with wealth polarity broadening. Meanwhile, elections in major global markets are serving as a referendum for newly enfranchised younger voters to speak up about issues they care about, from women's health to immigration.

In this era of poly-or perma-crisis, you might expect people to have grown disengaged and fatalistic, but instead we are seeing the emergence of very different responses from people around the world. Meaningful Brands™, Havas' annual analysis of people's attitudes, behaviors, and expectations of brands, has been

tracking shifts in the consumer and brand landscape since 2009. What has emerged in 2024 is a distinct sense of spirit, optimism, and agency about effecting change in people's day-to-day lives, the environment, and society at large.

After years of disruption, pressure, and accumulative challenge, our global study finds today's consumers are stepping back in. They are hopeful, spirited, and motivated to take control of their futures, and are looking for brands to support them on this journey. Even in severely challenged regions, and groups, where crisis could be overwhelming and create hopelessness, we are seeing determination toward agency over apathy. People are voting in elections and putting money behind brands that have values, are mission-based, and transparent. Timely then that national elections have been held in more than 60 countries (as well as the European Union) during the course of 2024—home to nearly half the global population.



Not enough time to read this, listen to the Havas GenAI podcast for a short summary (Powered by Google NotebookLM)





Welcome to The Rise of the Change Makers.

“We’ve named this study: **The Rise of the Change Makers** because that’s exactly what is happening around the world. We’re seeing a new spirit emerge among people. One of action, control, and confidence, but with an emphasis on mobilizing communities to create positive change.

This creates an exciting new atmosphere and opportunity for brands as a result—one where they too can become change makers, help people solve challenges big and small, and be platforms for consumers to make a difference in things they care about.”

—**MARK SINNOCK**
GLOBAL CHIEF STRATEGY, DATA
AND INNOVATION OFFICER, HAVAS
CREATIVE NETWORK

Today’s consumers are not taking disruption lying down. They are taking action, voting, organizing, and embracing optimism over adversity, and adaptivity over ambivalence. And they feel empowered to shape what comes next. The question is, will your brand help them along the way?

It’s an interesting pivot from years past.

In 2021, we charted “**The Age of Cynicism**,” a movement among people who felt disillusioned by brands claiming to solve world problems and overstating the good they had achieved.

More recently, in 2023, we saw a shift to the “**Me-conomy**,” as people, en masse, started to take stock of their own daily challenges—even amid big world events—and demand that brands keep them center stage.

“In 2024, anxiety and engagement about macro topics like the climate crisis are high, but so too is people’s concern about their daily lives.

People still expect help, and consumer centricity from brands, but the difference is they now increasingly feel a sense of agency and empowerment to effect change themselves. They are prepared to build the future they want. And are looking for brands to be agents of positive change in that world, too.”

—**JOANNA LAWRENCE**
GLOBAL CHIEF STRATEGY OFFICER,
HAVAS MEDIA NETWORK



About Meaningful Brands™

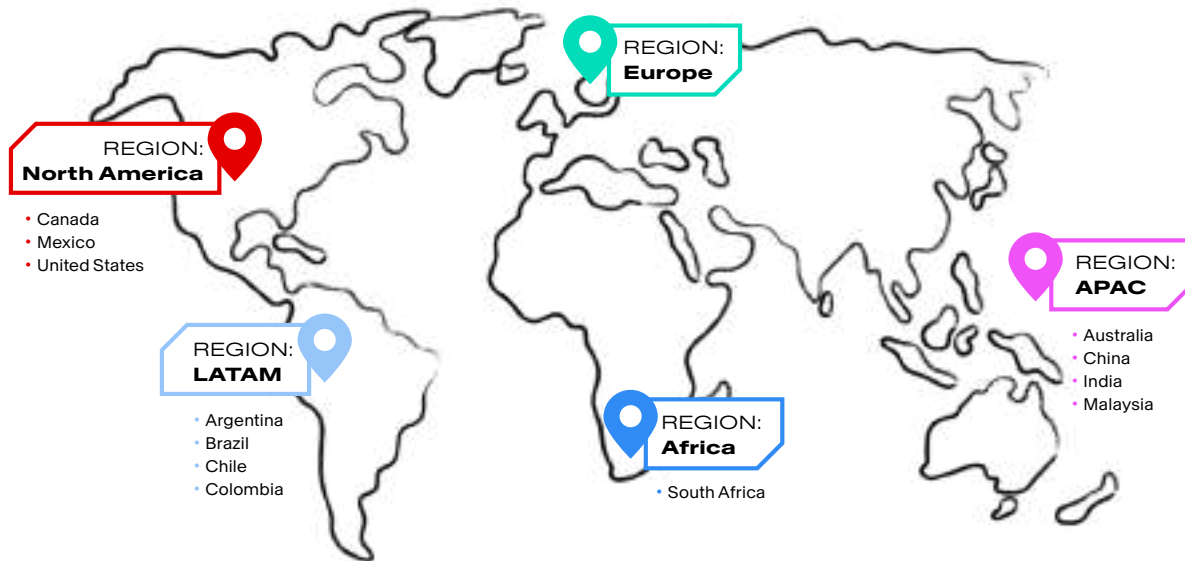
Commissioned through YouGov in 2024, “The Rise of the Change Makers” surveyed more than 156,500 respondents, across 24 markets and more than 2,600 brands.

Havas has measured Meaningful Brands™ annually since 2009. Now, nearly 16 years into this landmark proprietary study, our Meaningful Brands™ study continues to be a vital sense check about people’s aspirations, guardrails, and expectations of brands.

The methodology examines a brand’s impact and equity based on consumers’ perceptions and expectations across three key pillars—its personal, functional, and collective benefits (listed across 40+ dimensions and attributes). The most Meaningful Brands™ are the ones performing well on all three metrics.

Powered by **YouGov**

- Austria
- Germany
- Netherlands
- Belgium
- Ireland
- Poland
- Estonia
- Italy
- Spain
- France
- Lithuania
- UK



Interviews:
1,620,400+

Citizens:
156,500+

Brands:
2,600+

Markets:
24

Categories:
47

1 FUNCTIONAL
Rational benefits focused on product functionality, customer service, interactivity, and technology

2 PERSONAL
Messaging and behaviors that connect on an individual basis and serve a specific personal need, want, or feel

3 COLLECTIVE
Company initiatives, actions, and impact that respond and connect on social and cultural levels

CHAPTER 1

The New Era of Agency

How resilience, control, and optimism against a backdrop of “permacrises” are leading to a new sense of agency



People around the world are experiencing myriad challenges every single day, including making sense of a stream of headlines about major world events from climate change to geopolitics to war. Previously, their dominant response has felt reactive, as they deferred responsibility and accountability to brands and institutions.

In 2024, we find the emergence of a radically different mindset. Today, people are not shying away from change but instead facing up to it with newfound resilience and optimism. They are adapting, seeking control of their lives, and taking initiative to make change happen. And they are selecting brands that are empowering them to drive progress and positively shape what comes next.

As our title suggests, while purpose in recent years has become a much used mantra for both people and brands, today the focus is increasingly on “progress.” In other words, it’s not enough to make promises in 2024—what are you doing about it? Even on a day-to-day level, consumers are tuning in to brands that create positive change and help to make lives easier.

We call this the **Era of Agency**. It’s a move from passive behaviors to active, from disenfranchised to empowered, and amid ongoing disruption, it’s about adaptability. This creates a new role for brands too, where empathy, accountability, and impact become critical levers to unlock success.

While a sense of agency is doubtlessly rising, make no mistake, people's awareness of global crises remains high.

70%

The world is going in the wrong direction at a global level

People are anxious and cautious

58%

Worry about the future

52%

My financial future is generally **not positive**

And yet, happiness and optimism are prevailing

67%

feel **happy** in life

59%

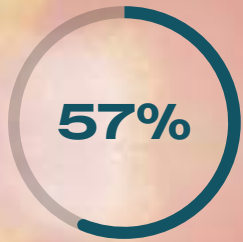
feel **optimistic** about the future

74%

I look to **humor** as a way to lighten the load **when times are tough**



And a real sense of possibility and opportunity exists.



There are so many new, **innovative ideas** that **are fueling our progress**

Net 23% agree:

My financial future **is generally positive**
My **future is bright** and full of opportunities

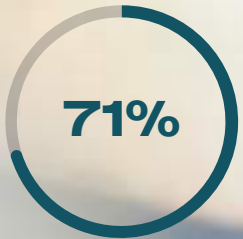
Against this backdrop, increasingly, people expect brands to make a meaningful difference—to their lives, to society, and to the planet.

Superficial PR statements will be rejected by today's savvy audiences with cynicism. Demonstrable impact is becoming more important than ever.

Companies/brands should...



Show more **humanity and generosity** when times are tough



Be doing much more for the good of society and the future of our planet—**communication is not enough**



Do more to **support our local communities/causes**



This represents a continuation and evolution from 2023's "Me-economy" report. That report showed that people expected action from brands on world events, and cared about them deeply. But there was also a tactical, local, and highly personal level to their outlook.

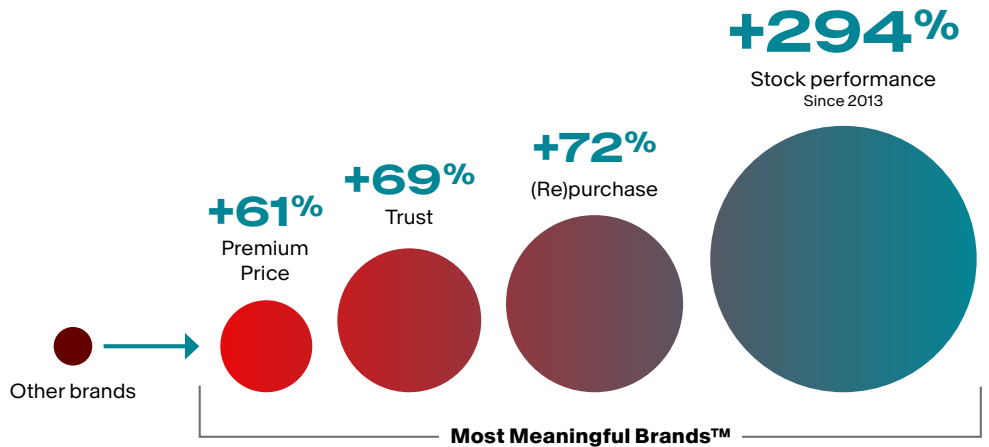
With expectations remaining high, action is now even more important than ever. Climate change is pressing, but people also expect brands to help with day-to-day challenges, especially as they are exacerbated by income inequality, inflation, and rising living costs.

The inconvenient truth
Most brands are not meeting people's expectations



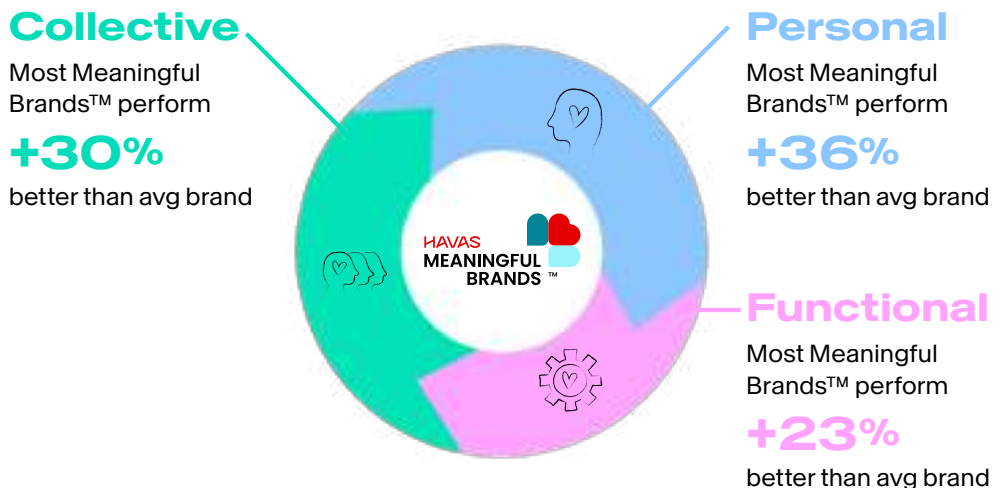
Yet, some brands have unlocked how to be more meaningful and they are reaping the benefits

Our study shows that the most Meaningful Brands™ outperform the market significantly



What is the key to being more meaningful?

The most Meaningful Brands™ show more empathy and more humanity



In the Era of Agency, a human lens and true action will be prerequisites for creating Meaningful Brands™. Brands will need to mirror the rising sense of agency people feel with their own demonstrable actions, as well as efforts to help their audiences shape their destinies. If they do, they are well placed to capture 2024's rising Change Maker spirit.

Our research found a new sense of deep engagement in positive futures—personal and communal—gathering pace and taking hold among people who want to make change happen for themselves and others.



This is important, because the locus of control is shifting to people



CONTROL

I feel in control of my life today



RESILIENCE

I don't let the tough times keep me down, I keep moving forward



INITIATIVE

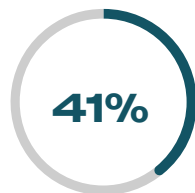
I put time aside just for me—to relax and recharge

They are making positive change happen



TO THEIR PERSONAL LIVES

I make a real effort to be physically and mentally healthy



TO THEIR COMMUNITY

I dedicate my time and/or resources to helping those less fortunate in society (Net agree +14%)



TO SOCIETY AND PLANET

I put a lot of effort into being environmentally responsible

Welcome to the New Era of Agency



It's one of increasing optimism even against adversity and one where control and action will take more precedence in people's minds, in the way they live and the brands they choose.

The last few years have seen unprecedented change and disruption, and relentless technological advances—some exciting, some concerning, some raising as many questions as answers.

We've lived through extreme world events, seen the rise of entirely new phenomena and industries, and the collapse of many others.

Consequently, we're seeing agency become a key emotional need among people—a way to navigate today's turbulent times, but also be stakeholders in the future. Brands that offer them more control, and the ability to shape the future at a macro and personal human level will thrive.

What do we mean by "agency"?

General view:

“Agency is the sense of control that you feel in your life, your capacity to influence your own thoughts and behavior, and the faith you have in your ability to handle a wide range of tasks and situations. Your sense of agency helps you to be psychologically stable, yet flexible in the face of conflict or change.”

— MARK SINNOCK

GLOBAL CHIEF STRATEGY, DATA AND INNOVATION OFFICER, HAVAS CREATIVE NETWORK

From neuroscience research:

“Agency generally covers how humans act on the world and interact with their environment. Neuroscience research shows that the more an individual impacts their environment, the more pleasure they derive from it. Agency is the little child who walks and sees their parents admire them, the musician who plays and sees people dance...It is also the consumer who shops intelligently and realizes that they got more, of better quality, and for less money, thanks to their shopping skills. Agency is an important source of the pleasure that our brain constantly seeks.”

— SÉBASTIEN EMERIAU

CHIEF STRATEGY OFFICER, STRATEGY AND DEVELOPMENT, HAVAS MEDIA FRANCE

What does “agency” mean around the world?

We asked our local strategists



From the United States

“In the US, **agency is purchasing power**. Additionally, we are living at a time when technology gives us both a sense of control while it also very much controls us. In this context, **agency represents people’s power to choose when and where to engage and disengage.**”

—JENNIE SCHEER, VP, INTELLIGENCE STRATEGY, HAVAS MEDIA US



Narratives on both sides of the political spectrum in the run up to the **US election**—from the Democrats and Republicans—are oriented around the power of Change, the idea of taking control and initiative and moving away from the past—the idea of exercising agency.



From LATAM

“Latinos are **taking matters into their hands and acting collectively**, but actions don’t always end in real change given our weak social and economic support system.”

—DIEGO PLAZAS, CHIEF STRATEGY OFFICER, HAVAS LATAM

L’ORÉAL

L’Oréal is taking a powerful leadership position by tackling issues like ethics, not only on harassment of women but also on animal cruelty, a major issue for people in Latin America.



From Spain

“Spanish society is extremely tense and polarized across economic, social, political, and employment issues. There is a real feeling of discomfort. This is creating an intergenerational need throughout society to reconfigure reality—our way of being; how we live our lives; what matters. A desire for greater consistency between our thoughts and behaviors. A greater sense of agency enabling people to be **more autonomous and free to choose.**”

—ALBERTO ZCHIESCHE, GENERAL STRATEGY MANAGER, HAVAS CREATIVE SPAIN

holaluz

Holaluz is empowering people to be more autonomous in their energy sources with its campaign “**la revolución de los tejados.**” They have set out to bring life to all the roofs around us by turning them into something that benefits everyone. That is why they have started a movement in which people provide their roof and they provide the Revolution. They are installing solar panels on available roofs to ensure that more than 40 million people can enjoy green energy at a fairer price.



From India

“Agency has been this nation’s macro narrative since the early days of our Prime Minister Narendra Modi’s rule which started back in 2014. To me, this agency is linked to **optimism and restoration.**”

—JOHN THANGARAJ, CHIEF STRATEGY OFFICER, HAVAS CREATIVE INDIA



One brand that has been preaching the “agency” gospel for a while is **Tata Tea**, with its “Jaago Re!” (Awaken!) campaign. For over a decade, “Jaago Re” has empowered and inspired Indians to stand up for a wide array of different causes, from voting to the environment. Currently, it is aimed at mobilizing mass behavior to fight climate change.



From Germany

“The country is in recession, the mood is down, people are worried about the right shift in the political landscape. So many are feeling helpless. Still, as always there are also those who want to **take their destiny in hand, act, and change things.**”

—SANDRA ONOFRI, CHIEF STRATEGY OFFICER HAVAS CREATIVE GERMANY



Deutsche Telekom is innovating by developing human experiences to improve inclusion with digital literacy programs and educational resources delivered through affordable internet access.



From France

“There is something interesting and original in the focus on **willpower**. It could be even more radical, driven by the **desire to fight and overcome challenges**. There is **a sense of resilience** and a genuine interest in anything that allows them to **regain control over their lives.**”

—MATTHIEU LOITRON, HEAD OF DATA, HAVAS CREATIVE FRANCE



Decathlon empowers consumers by democratizing sports practice through affordable products tailored to their needs. By offering circular services such as equipment rental or repair, the brand allows everyone to take control of their sporting experience, helping them regain a sense of agency over both their bodies and the environment.



From the Middle East

“The idea of agency is tricky here. There’s less individual agency in the traditional sense—for example through voting in elections—so people in this region tend to look to their leadership to drive progress. What’s key is that they still feel **a sense of involvement and pride in these shared goals.**”

—ALEJANDRO FISHER, SVP, STRATEGY AND PRODUCT INNOVATION, HAVAS MIDDLE EAST



Adidas continues to promote holistic health through its initiatives, including the “Run for the Oceans” campaign. This brings personal fitness together with environmental responsibility, demonstrating the potential for individuals to engage on multiple fronts.



From Australia

“People are looking to **change their daily lot more than change the world.**”

—OLLY TAYLOR, CHIEF STRATEGY OFFICER HAVAS HOST AUSTRALIA



The best example is **Aldi**, a discount retailer, which has built a market share of 17% by championing and supporting the needs of real people, at a time when consumer confidence is low, challenging, more established retailers like Coles and Woolworths, a brand under investigation for price fixing.



CHAPTER 2

The Faces of Change

How people are responding to “permacrises” in diverse ways with a range of expectations for the change they want to see

Agency is about making change happen. But change can mean a lot of things in this new era. There’s the more ambitious stuff, of course—elections, social justice, humanitarian crises, which are the subject of deep focus for many. But elsewhere it could just be a simple desire to make positive choices, purchase brands that are doing good, or take small steps to live a better life. At Havas, we recognize this spectrum—understanding it is vital for brands big and small to resonate with audiences and understand where to focus their actions.

“ Just as no generational cohort from millennials to baby boomers conforms to neat behaviors, so do the **Faces of Change** have their own subgroups. These groups are shaped by their attitudes, outlooks, behaviors, and specific contexts.

For some of these groups, it’s about helping them effect positive change in their lives, or simply enabling them to become more earth-friendly, globally minded, ethical consumers. For others, the role of brands is to drive societal shifts. And for those facing adversity, it’s about brands stepping up to make a difference and meaningful improvements to their lives.”

—TONY MATTSON
GLOBAL STRATEGY PARTNER,
HAVAS CREATIVE NETWORK

Introducing the Faces of Change

MORE AGENCY
More control, optimism, initiative

LESS AGENCY
Less control, optimism, initiative



Committed Citizens

16.5%



Progressive Optimists

21.5%



Carefree Pragmatists

16.4%



Pressured Advocates

17.3%



Challenged Skeptics

17.5%



Disengaged Pessimists

10.8%

% of global respondents

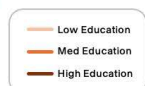
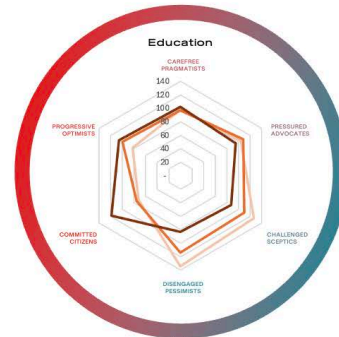
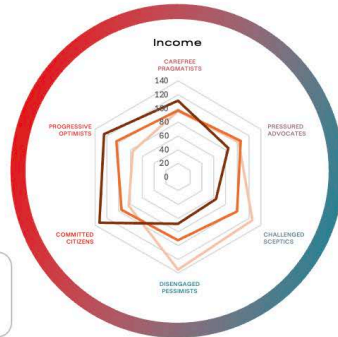
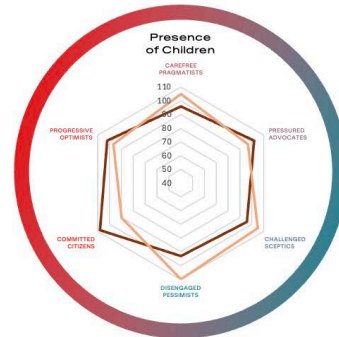
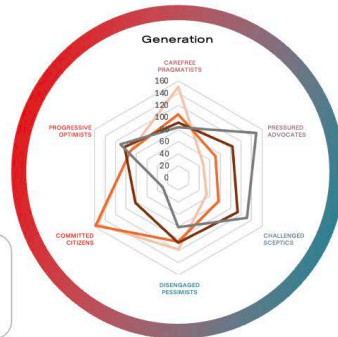
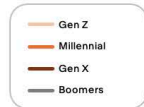
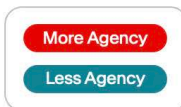
To explore how people are relating to change and manifesting agency in 2024, we have identified six **Faces of Change**: groups of people globally who share similar attitudes and behaviors. They span from hyper-engaged, civically minded people and those simply in search of feel-good brands and purchases, to people struggling deeply with societal issues, needing brands to lend a helping hand to improve their lives (in the absence of governmental or systemic support).

Why is this important? A lot of brands are asking for consumers to “get involved” or “build community” around a purpose or a project or an initiative—what our data indicates is that the “type of program” is going to appeal to various types of people. We have created a sensibility to help brands understand what types of people relate to different types of initiatives.

Socio-demographic profiles

Income

Education



How have we done it? Our **Data Foundation** comes from the Meaningful Brands™ Consumer Insight data. We have created an **Audience Solution** by running Cluster Analysis on answers given by the full global respondent base (156,543 adults) to 70 statements (all excluding those on Crisis). We have enriched our

understanding of these people with further **Human Description** using generative AI tools such as Copilot. The output of this work is six **Faces of Change** built out from the global Meaningful Brands™ data set, each with profiles enhanced using exciting, new generative AI practices to build what we call PersonAI.

Face of Change #1 Committed Citizens

MY VALUES

"It's all about making a difference. I focus on what I can control. I dedicate my energy to helping those less fortunate. I know my purchasing power counts, and I try to use it wisely."

ENVIRONMENT

"Being environmentally responsible is not negotiable for me. I make an effort every single day to be mindful of my environmental impact."

CRISIS

"Even though I am aware of the crises we're facing—like climate change or social inequality—I choose to take action rather than despair. I believe that we're all part of the solution."



MEET Emma

MY COMMUNITY

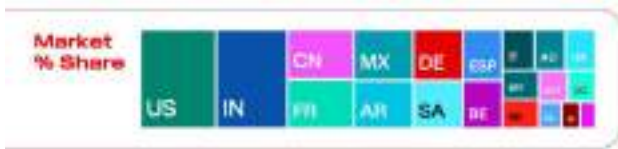
"I lean on both my online and in-person communities for support, connection, and inspiration. I believe there's more that unites us than divides us, and that's a belief that drives how I interact with others."

TECHNOLOGY

"I'm a big believer in the potential of technology. AI and other innovations have made my life easier; that said, I am also mindful of technology's darker side."

HEALTH

"My health—both physical and mental—is a priority. I've never felt healthier, and I do everything I can to keep it that way."



CHANGE TO ME MEANS...

"Positive progress for both people and the planet. It's about making conscious choices that improve our lives and the world we live in. I see brands as partners in this journey, not just as companies selling products but as allies in creating a sustainable and fair future for everyone."

WHAT MAKES BRANDS MEANINGFUL

"Brands that resonate with me better are the ones that respect my individuality, offer high-quality products, and make me feel valued."

"I want brands to be transparent, sustainable, and ethical. I care about innovation that makes the world better for all of us."

"I need to see that a brand is genuinely committed to making a positive impact on society."



Face of Change #2 Progressive Optimists

MY VALUES

"I've built a life around balance—family, work, and staying curious about the world. I value inclusivity, diversity, responsibility, and community. I want my life to be in harmony with the world around me."

ENVIRONMENT

"I'm environmentally conscious, willing to make sacrifices for sustainability, and choose brands that share this focus."

CRISIS

"While I recognize global challenges, I don't feel the world is spiraling. I see the environmental crisis as a responsibility we must act on, but I don't believe we're in an economic or health crisis."



MEET David

MY COMMUNITY

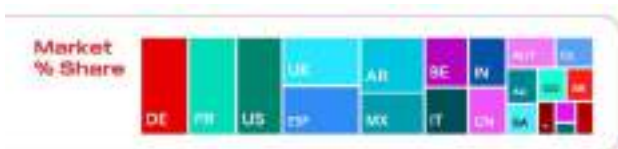
"I value community, both local and online, and prioritize buying from local businesses and supporting social initiatives."

TECHNOLOGY

"I see AI and other technologies as exciting tools for progress, and I value brands that use innovation to enhance products and society."

HEALTH

"Though I don't see myself as exceptionally healthy, I'm actively improving my wellness and supporting those around me in doing the same."



CHANGE TO ME MEANS...

"For me, change is about making sure the world is getting better—for us, for our kids, and for the earth. It's not just about the big stuff, but also improving our quality of life in little ways every day. I count on brands to be the ones driving that change, giving us the tools and products to make a real difference."

WHAT MAKES BRANDS MEANINGFUL

"Brands that simplify my life, energize me, and offer a sense of escape are the ones that truly resonate with me."

"I appreciate products that effortlessly fit into my lifestyle and enhance my well-being. I value brands that prioritize safety, maintain a solid reputation, and treat customers with respect."

"Trust is built through transparency and reliability, while innovation, ethical practices, and contributing positively to the economy are essentials I won't compromise on."



Face of Change #3 Carefree Pragmatists

MY VALUES

"Convenience is my priority. If something makes my life easier, I'm all in. I do care about equality and inclusivity, but I'm not out there on the front lines. I just want to live my life in a way that feels right and effortless."

ENVIRONMENT

"I'm not super focused on being eco-friendly. I'll do my part when it's easy, but I'm not about making big sacrifices for the planet. I care more about products that improve my daily life."

CRISIS

"Honestly, I don't feel like we're in any major crisis. Whether it's environmental, societal, or political, it's just not on my radar. I'm focused on making my own life work and doing what feels right for me."



MEET Alex

MY COMMUNITY

"I am part of a supportive community. I'm not very involved in my local community. If something's convenient and supports local businesses, great—but it's not my top priority."

TECHNOLOGY

"I'm a big fan of tech. AI, smart apps, all of it. I don't mind sharing my data if it means I get better service. Tech is how I stay efficient and on top of things without overcomplicating my life."

HEALTH

"I like to think I'm in pretty good shape. I take care of myself but in a way that's practical. I'm not obsessed with fitness or wellness; I want to feel healthy without too much effort."

Market % Share

| | | | | | | | | |
|----|----|----|----|----|----|----|----|----|
| US | FR | UK | DE | IN | BE | RU | BR | AU |
| 15 | 10 | 12 | 18 | 14 | 11 | 13 | 16 | 10 |

CHANGE TO ME MEANS...

"For me, change is all about making life flow more easily. I'm not looking for anything radical, just things that take away the hassle. I appreciate brands that simplify my day-to-day and adapt to what I need when I need it. If a brand can help me save time or avoid stress, that's the kind of change I want."

WHAT MAKES BRANDS MEANINGFUL

"I want brands that respect me, offer quality products, and keep things safe and simple."

"I love brands that give me an escape—whether it's through entertainment, making my life easier, or helping me feel energized."

"I appreciate transparency and innovation, but I'm not too focused on brands being super sustainable or ethical."



Face of Change #4 Pressured Advocates

MY VALUES

"I care deeply about honesty and doing what's right, even if it's difficult. Sustainability is a priority for me. I also try to help those less fortunate, through donations or volunteering—it's important to give back."

ENVIRONMENT

"I care about the environment and do what I can to be responsible—buying locally, reducing waste, and making sustainable choices. But it feels like it's not enough."

CRISIS

"There's no denying we're living through multiple crises—political, societal, and environmental. It feels like the world is constantly on the brink of disaster, and that makes it hard to stay hopeful; the reality of the situation is hard to ignore."



MEET Linda

MY COMMUNITY

"I make an effort to support local businesses, but I don't feel as connected to my community as I'd like. There's a sense of isolation that comes with today's world, and I wish there were more ways to feel a part of something bigger."

TECHNOLOGY

"I'm deeply skeptical of technology, especially AI. I've seen too many examples of it being used in harmful ways, and I'm worried about the long-term impact it will have on society."

HEALTH

"I know I'm not as healthy as I could be. Between the stress of the world and trying to balance everything, it's hard to prioritize my health the way I should."

Market % Share

| | | | | | | |
|----|----|----|----|----|----|----|
| FR | US | UK | DE | AR | BR | AU |
| 12 | 18 | 10 | 15 | 14 | 11 | 13 |

CHANGE TO ME MEANS...

"For me, change means building trust again and showing that we can make progress in a world that often feels like it's falling apart. Brands need to lead that change, not just talk about it. What I need is for more companies, governments, and people to truly commit to this change—not just because it's trendy, but because it's necessary. So while I'm playing my part, I need to see more from those in power."

WHAT MAKES BRANDS MEANINGFUL

"I look for brands with a good reputation and quality, safe products."

"Trust is essential to me. Brands that simplify my life, offer a bit of escape, and bring moments of happiness stand out to me."

"I value brands that are transparent, show integrity, and support gender equality and broader social progress."



Face of Change #5 Challenged Skeptics

MY VALUES

"I believe in **speaking the truth**, even when it's uncomfortable. I've never been the kind of person to go along with something I don't believe in. I'm just trying to **live honestly**, make it through the day, if lucky, to **relax and recharge** through simple things."

ENVIRONMENT

"Look, when you're living on a budget, you have to make **practical choices**. **Sustainability's** important, but **survival** comes first for me. I **try to do what I see**, but I don't have the luxury of making big sacrifices for the planet."

CRISIS

"Let's face it: **the world's in a bad spot**. It's not just something you hear about on the news. It's something I live through, especially when **prices keep rising** and there's **no relief** in sight. It's **exhausting**, but I'm used to **fighting** my way through challenges."



MEET George

MY COMMUNITY

"Community? I'm not sure I even know what that feels like anymore. People seem more disconnected than ever. Sure, I buy local products when it makes sense, but that's just out of practicality. I'm not involved in any neighborhood activities."

TECHNOLOGY

"All new tech—most of it feels like **trouble**. I've seen how fast it's changing things, and frankly, it makes me **nervous**. I **don't share any data**. I know **technology has its place**—it's just a question of whether it's doing more harm than good."

HEALTH

"I'm **not in the best shape**, but I do what I can. It's **hard to focus** on health when I have bigger things to worry about. I take care of myself where possible, but it's **not a priority** in these uncertain times."

Market % Share

| | | | | | |
|----|----|----|-----|----|----|
| UK | FR | US | DE | IT | AR |
| | | | ESP | BE | AU |

CHANGE TO ME MEANS...

"Well, for me, change isn't about some grand revolution, it's about survival, it's making sure I can get by, that my paycheck lasts, and that I have what I need to keep a roof over my head. I don't expect big miracles or companies to swoop in and save the day. But change, to me, means brands and businesses showing up when it counts—being fair, giving a little back, and maybe making things just a bit easier for people like me."

WHAT MAKES BRANDS MEANINGFUL

"Brands need to **step up when times are tough**. A little kindness goes a long way these days. And if they can help me save some money, even better."

"Sustainability matters too; **companies should be doing more for the planet**, not just talking about it."

"Given how uncertain everything is, they should **have a long-term plan** in place, and it wouldn't hurt if they did more to support local."



Face of Change #6 Disengaged Pessimists

MY VALUES

"I don't spend much time worrying about things like whether the world is getting better or if people are doing the right thing. I **don't care about bigger issues** when money is tight. As long as things work and **help me get by**, that's enough for me."

ENVIRONMENT

"Environmental stuff isn't high on my list. I get that it's important, but it feels far from what I can do anything about. I'm just trying to make it through the day **without worrying about saving the planet**."

CRISIS

"I'm living through the **economic crisis** every day. Things are going **downhill**, and I **don't see much changing** for people like me. The constant uncertainty is exhausting. I don't feel like the world's as inclusive as it used to be, this feels like a **societal crisis**."



MEET Mila

MY COMMUNITY

"I'm not really part of any strong community. My friends are all in the same situation, but we don't have a lot of support beyond that. I'm not into local or online communities much, either. It feels like something people have, but not me."

TECHNOLOGY

"All and new technology sound scary, especially for people like me who already feel left out of big changes. I use tech when I have to, but I **don't think it's going to solve any of the problems** I face."

HEALTH

"I'm doing alright but I **knew I could be healthier**. But with how things are, **focusing on wellness seems like a luxury**."

Market % Share

| | | | | | | | |
|----|----|----|-----|----|----|----|----|
| US | FR | UK | ESP | IN | DE | AR | AU |
| | | | IT | BE | CA | BR | RU |

CHANGE TO ME MEANS...

"To me, change means getting some control back in my life. Right now, it feels like I'm just reacting to whatever life throws at me—no real choices. It would mean feeling like my choices actually matter. It's not about big, world-changing movements; it's about having the basics covered—knowing that I can pay rent, find steady work, and not feel so stuck. I'm not looking for miracles, but I want a shot at a better life, something that feels stable."

WHAT MAKES BRANDS MEANINGFUL

"Honestly, I **don't expect much** from brands. They should be doing more for society and the planet, but that's not really what I focus on."

"It's more about whether they **make my life easier and affordable**. If they showed more humanity when things are rough, I'd notice, but I don't expect them to."

"Supporting local communities or having a long-term plan? Sure, that would be nice, but I **don't count on it**."



A photograph showing two hands clasped together in a firm grip. The hands are positioned in the center of the frame, with one hand slightly above the other. The background is a solid, light blue color. The lighting is soft, highlighting the texture of the skin and the creases in the hands. The overall mood is one of partnership and support.

CHAPTER 3

The Change Makers

How brands can become Change Makers, taking meaningful actions to drive progress for people, society, and the planet

What's becoming clear in the **Era of Agency**, and also looking at the emerging representations of this in our **Faces of Change** personas, is a need for brands to shift their thinking in new and more radical, if also nuanced, ways. It's also a moment where the role of brands is shifting to being a driver of change in itself.

As Seema Patel, Managing Director, Global Intelligence at Havas Media Group explains: "**Change Makers** can be people but also brands. The key is empowering audiences and becoming platforms for change in both their own actions and what they offer."

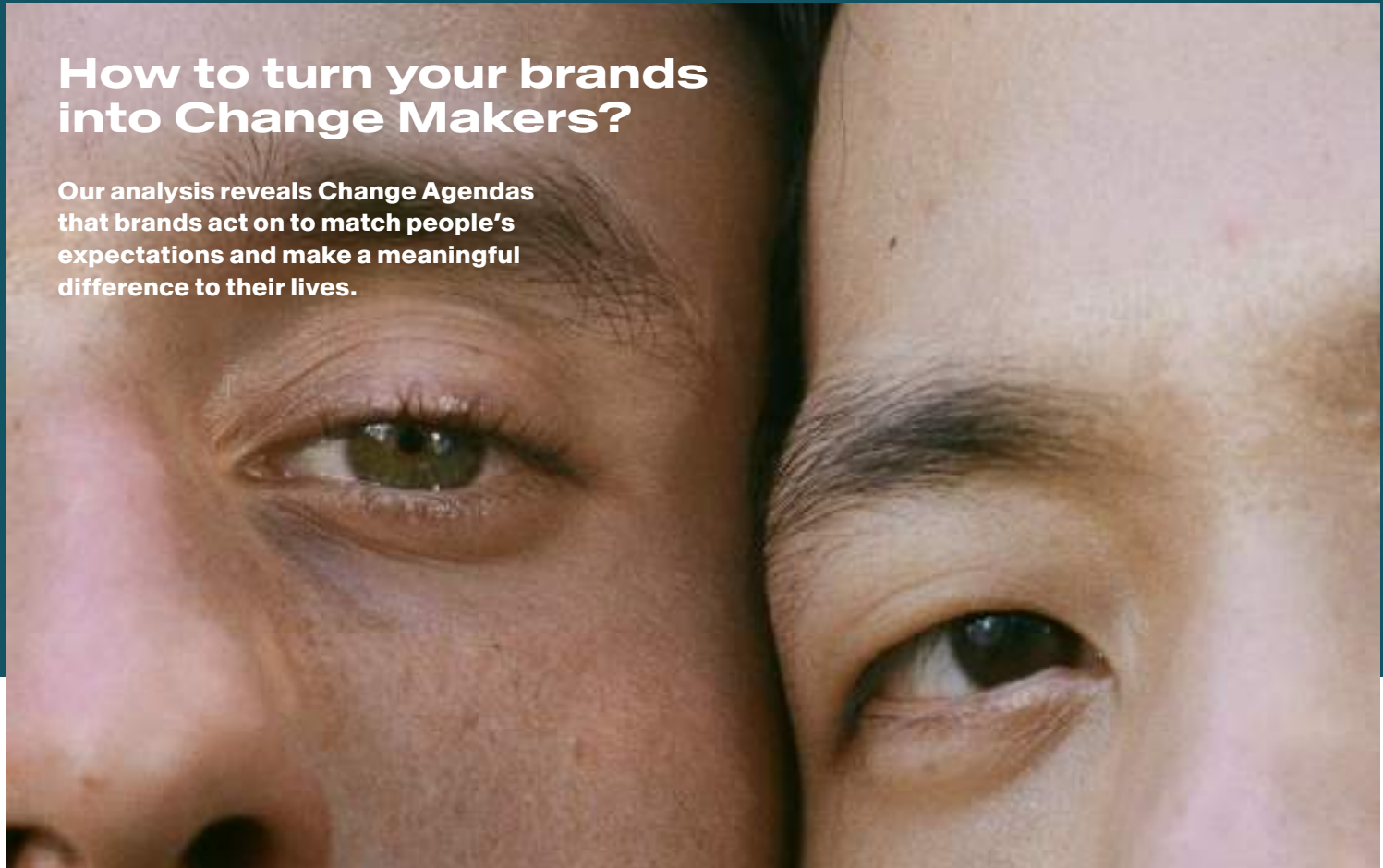
How should they do this? If consumer-centricity has been the watch word of every successful brand, the focus next will increasingly be *human*-centricity—and exploring change from a more personal perspective. "It will require brands to think more holistically about

people's lives, aspirations, motivations, challenges, and contexts and what their role is —what is the relationship? What do they gain from that? And what change do people personally want to see? How can brands help meaningfully transform people's lives? That's the opportunity," explains Havas' Patel.

Increasingly, that will mean empowering people to make changes both big and small. For themselves, and the world. As brands, it can inform change-making services and products, social good strategies, but can also take the form of being active supporters for consumers to lead changes in their communities and beyond. Always respecting their role in the relationship, and focusing on true impact over transparent marketing.

How to turn your brands into Change Makers?

Our analysis reveals **Change Agendas** that brands act on to match people's expectations and make a meaningful difference to their lives.



We've identified **five key Change Maker Agendas** where people see and expect brands to make the Most Meaningful impact:

#1
Prioritize Practical Solutions

#2
Champion Responsible Innovation

#3
Promote Well-being For All

#4
Live Purpose, Don't Just Preach It

#5
Cultivate Community Connection

Prioritize Practical Solutions

Focus on supporting people's needs by providing value that simplifies everyday life by saving time and money and reducing complexity.



PEOPLE ARE: PRAGMATIC



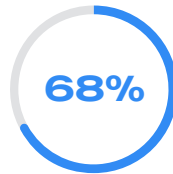
I am more cautious today about how I spend my money



It's difficult to plan for the future when the world is so uncertain

MEANINGFUL BRANDS™ OPPORTUNITY: ALLEVIATE EXCESS

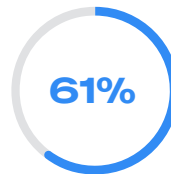
People believe brands should:



Help me save money



Be dedicated to make my day-to-day life easier



Help me save time



The best KPI to drive this agenda: **PURCHASE**

Mostly led by the functional and personal pillars, 2024 Purchase scores augment with the following Top 10 attributes across all brands:



LEARN FROM the most Meaningful Brands™ and become Change Makers



WEALTH

Enables me to be smarter with my money and/or time

Most Meaningful Brands™ perform

+35%
better than avg brand



SIMPLIFY

Helps me simplify my life

Most Meaningful Brands™ perform

+33%
better than avg brand

In times of uncertainty, your role, as business owners, is to help people fulfill their essential needs while alleviating the increasing stressors of today's increasingly challenged living.

**—SEEMA PATEL
MANAGING DIRECTOR,
GLOBAL INTELLIGENCE,
HAVAS MEDIA NETWORK**

2 Champion Responsible Innovation

Embrace technology with an optimistic outlook but balance it with respect and responsibility, ensuring the protection and ethical use of personal data.



PEOPLE ARE: TECH-FORWARD



Technology is doing us more good than harm

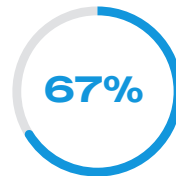


Technology is creating new exciting possibilities for us as a society

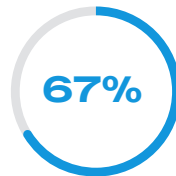


Brands that are using AI to improve their products and services are innovative

MEANINGFUL BRANDS™ OPPORTUNITY: REINFORCE PROTECTION



I am concerned about the lack of personal privacy in the digital age



I believe society should regulate the development of AI technologies to address ethical concerns



I am careful and put effort into protecting myself and my data online



The best KPI to drive this agenda: **TRUST**

Mostly led by the functional pillar, 2024 Purchase scores augment with the following Top 10 attributes across all brands:



LEARN FROM the most Meaningful Brands™ and become Change Makers



DATA PRIVACY

Respects my personal data

Most Meaningful Brands™ perform

+26%
better than avg brand



CONTROL

Helps me feel in control of my day-to-day life

Most Meaningful Brands™ perform

+25%
better than avg brand

“As marketers adopting new technologies, it’s crucial to build trust with people to prevent skepticism and alleviate concerns about data privacy or ethical issues.”

—**JOANNA LAWRENCE,**
GLOBAL CHIEF STRATEGY OFFICER, HAVAS MEDIA NETWORK

Promote Well-being for All

Elevate holistic health and enhance the quality of life across diverse generations and communities, recognizing the interconnectedness of people's physical, mental, and social well-being.



PEOPLE ARE: CONSCIENTIOUS



I make a real effort to be physically and mentally healthy



I help and encourage my loved ones to be mentally and physically healthy



I do more now to try and improve my mental health than a year ago

MEANINGFUL BRANDS™ OPPORTUNITY: PROMOTE WELL BEING



I am the healthiest I have ever been

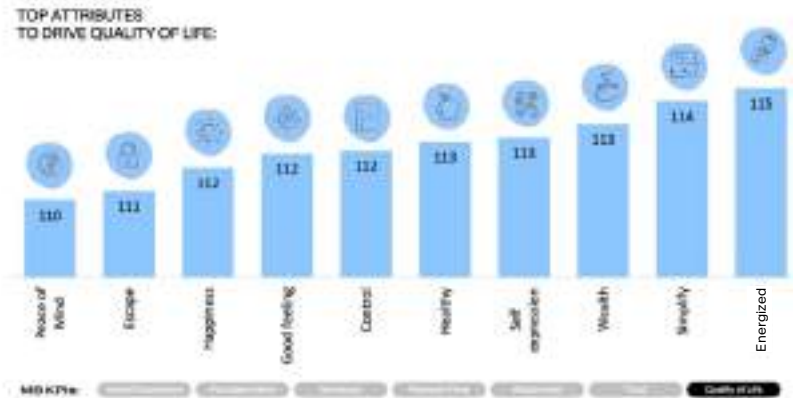


Consumers believe brands should be doing more to improve and support consumers' health and well-being



The best KPI to drive this agenda: **QUALITY OF LIFE**

Mostly led by the personal pillar, 2024 QoL scores augment with the following Top 10 attributes across all brands:



LEARN FROM the most Meaningful Brands™ and become Change Makers



HEALTHY

Inspires me to take a healthier approach to my life

Most Meaningful Brands™ perform

+38%
better than avg brand



GOOD FEELING

Helps me feel good about myself

Most Meaningful Brands™ perform

+36%
better than avg brand

“People are prioritizing their health, but many are still striving to feel their best. As brands, you need to focus on enhancing consumers' quality of life to support their journey.”

— **BRIAN ROBINSON**
GLOBAL CHIEF STRATEGY OFFICER AND HEAD OF GROWTH, HAVAS HEALTH NETWORK

4 Live Purpose, Don't Just Preach it

Drive meaningful change by tangibly demonstrating commitment to social and environmental causes through authentic initiatives that deliver real impact.



PEOPLE ARE: INTENTIONAL



Consumers have stopped buying from brands that do not respect the planet or society

AND BELIEVE

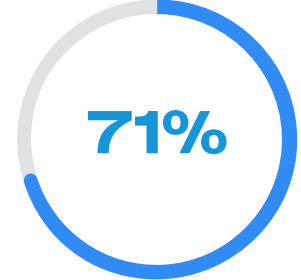


Brands should be making products that are more sustainable



Brands should use their power to influence or effect change

MEANINGFUL BRANDS™ OPPORTUNITY: TAKE CONCRETE ACTION

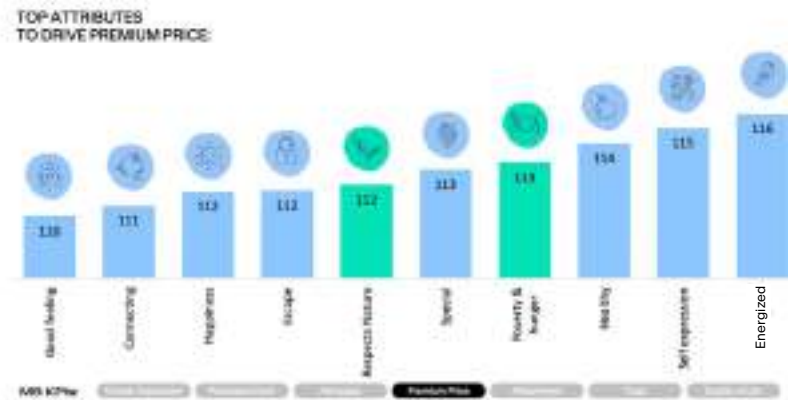


Brands should be doing much more for the good of society and the future of our planet—communication is not enough



The best KPI to drive this agenda: **PREMIUM PRICE**

Mostly led by the personal and collective pillars, 2024 QoL scores augment with the following Top 10 attributes across all brands:



LEARN FROM the most Meaningful Brands™ and become Change Makers



CAUSES

Proactively supports social issues and good causes

Most Meaningful Brands™ perform

+31%
better than avg brand



TRANSPARENT

Is transparent and honest in its activities and communications

Most Meaningful Brands™ perform

+29%
better than avg brand

“When consumers pay a premium for a product, they demand more from brands. As business owners, you need to contribute to philanthropic causes and actively work toward making the world a better place.”

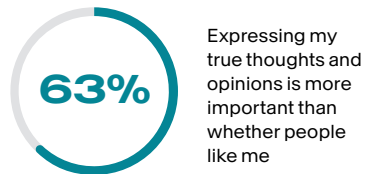
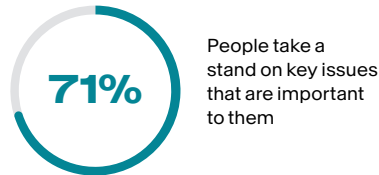
—TONY MATTSON
GLOBAL STRATEGY PARTNER,
HAVAS CREATIVE NETWORK

#5 Cultivate Community Connections

Support and celebrate the unique identities and voices of communities, fostering a sense of belonging and promoting an inclusive, people-first future.



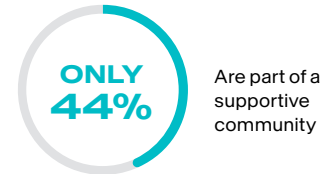
**PEOPLE ARE:
VOCAL**



**RESULTING IN A
DIVISIVE LANDSCAPE**

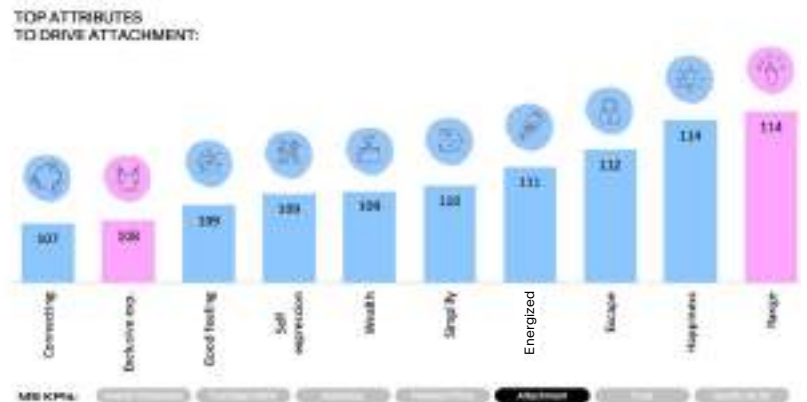


**MEANINGFUL BRANDS™
OPPORTUNITY:
CREATE
CONNECTIONS**



The best KPI to drive this agenda: **ATTACHMENT**

Mostly led by the personal and functional pillars, 2024 QoL scores augment with the following Top 10 attributes across all brands:



LEARN FROM the most Meaningful Brands™ and become Change Makers



SELF-EXPRESSION

Helps me express myself as an individual

Most Meaningful Brands™ perform **+37%** better than avg brand



CONNECTING

Helps me connect with others

Most Meaningful Brands™ perform **+35%** better than avg brand

“As brands, you have the opportunity to meet consumer needs by fostering connection and community. Welcome diversity, recognize the multitude of individuals, and talk to them on their level vs en masse where possible. Build bridges between the fragmented divisions, and invite participation and engagement around communities for stronger brand attachment, advocacy, and trust for the long-term attachment.”

—MARK SINNOCK
GLOBAL CHIEF STRATEGY,
DATA AND INNOVATION
OFFICER, HAVAS CREATIVE
NETWORK



Summary

We're in a new, exciting era where change may be accelerating, scary, new, disruptive and more—but our relationship with it is also shifting. And so are brands. Complex, macro world events may still loom large, similarly grassroots economic, social, and local challenges continue to create pressures on people's lives, but what has shifted is their attitude. In ways big and small, having a sense of agency isn't just the spirit of this new outlook, it's becoming a core psychological need and desire among people.

This in turn creates big opportunities for brands, but also new pressures. **Change Maker** brands of 2024 and beyond will be human centric, active, collaborative, and above all will be expected to be part of positive change in the future—whether that's in their own, or helping others build theirs. Welcome to **The Rise of the Change Makers**.



About Havas

Founded in 1835 in Paris, Havas is one of the world’s largest global communications networks, with more than 23,000 people in more than 100 countries sharing one single mission: to make a meaningful difference to brands, businesses, and people.

Havas has developed a fully integrated model through its 70+ Havas Villages around the world, covering all communication activities. The teams of the three business units Creative, Media, and Health & You work together with agility and in perfect synergy to offer tailor-made innovative solutions to clients who support them in their positive transformation.

Havas is committed to building a diverse culture where everybody feels they belong and can be themselves and thrive. Further information about Havas is available at www.havas.com.

Methodology

Havas has measured Meaningful Brands™ annually since 2009, furthering a commitment to bringing data science, insights, and an understanding of people to the core of its strategic methodology across businesses, brands, and markets.



“We have been investing in our landmark Meaningful Brands™ study for more than 15 years, and these insights now take on even greater prominence in our work for clients through our shared Converged strategy and operating system. We launched Converged to transform the client experience by building even more strategic bridges between creativity, media, production, and technology, and a shared understanding of today’s consumers is essential to this vision and to unlocking more meaningful growth for our clients and their brands.”

—YANNICK BOLLORÉ, CHAIRMAN AND CEO, HAVAS

Learn more about Meaningful Brands™ and access the 2024 report “The Rise of the Change Makers” at www.meaningful-brands.com

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Not enough time to read this, listen to the Havas GenAI podcast for a short summary
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