

# JOYFUL FRUGALITY

Prosumer Report

HAVAS GROUP

2023



# “Buy. Use. Trash. Repeat.”

This is how nonprofit B Lab defines today’s linear consumption model.

Over the past century, much of the world shifted to an economic system in which growth is tied to (over)consumption, waste, and environmental destruction. Citizens have morphed into consumers, and governments rely on their people’s nonstop spending to keep the system afloat.

What happens when the costs of that consumption-driven system become unsustainable and undesirable—and not just ecologically but also psychologically, eroding life satisfaction?

In 2023, people are fed up. Faced with escalating inflation, economic inequity, an energy crisis exacerbated by the war in Ukraine, shaken faith in the banking system, and fears of a global recession—all atop the introspection and questioning sparked by the “great pause” of the pandemic—more of us are considering a different approach, starting with changes in how we consume. We want to live with less to have more: a more meaningful existence. More free time. More financial security and psychological freedom. More faith that our planet will survive.

What role can brands play in this shift? How can businesses support behaviors that are better for people and the planet while making customers feel good about their choices? How can brands make mindful consumption—and even frugality—joyful?

To find out, Havas Group surveyed nearly 13,000 women and men aged 18 and older in 30 markets. We sought to better understand shifting attitudes toward consumption and how brands can make frugality satisfying.



# A World in Crisis

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In a world immersed in multiple crises—economic, ecological, ideological—people want to feel some measure of control. We see that in the workplace, where more employees feel empowered to set strict boundaries and hold their employers to higher standards. And we see it in people’s attempts to downsize and minimize their financial obligations to be better prepared to face whatever crisis comes next.



## THE JOY OF FRUGAL LIVING

Conscious consumption is hardly novel. For a couple of decades now, consumers—mainly in higher income brackets—have taken tentative steps toward consuming less. This has extended to various iterations of the simplification and decluttering movements, the rise of tiny homes, and the emergence of the [sharing economy](#).

The difference today is that people don't simply want to consume more mindfully. They want to live frugally. Unlike its cousin *austerity*—which typically is imposed on a population and involves unwanted sacrifices in an authoritarian context—*frugality* is self-propelled and aspirational. It's about both cost savings and the serenity that derives from simplicity.

Led by Prosumers, the vast majority of respondents to our study said they could happily live in a more frugal world.

I could be happy in a more frugal world\*

**79%** PROSUMERS



**67%** MAINSTREAM



I don't want frugality; for me, it's like going back to the Middle Ages

**12%** PROSUMERS



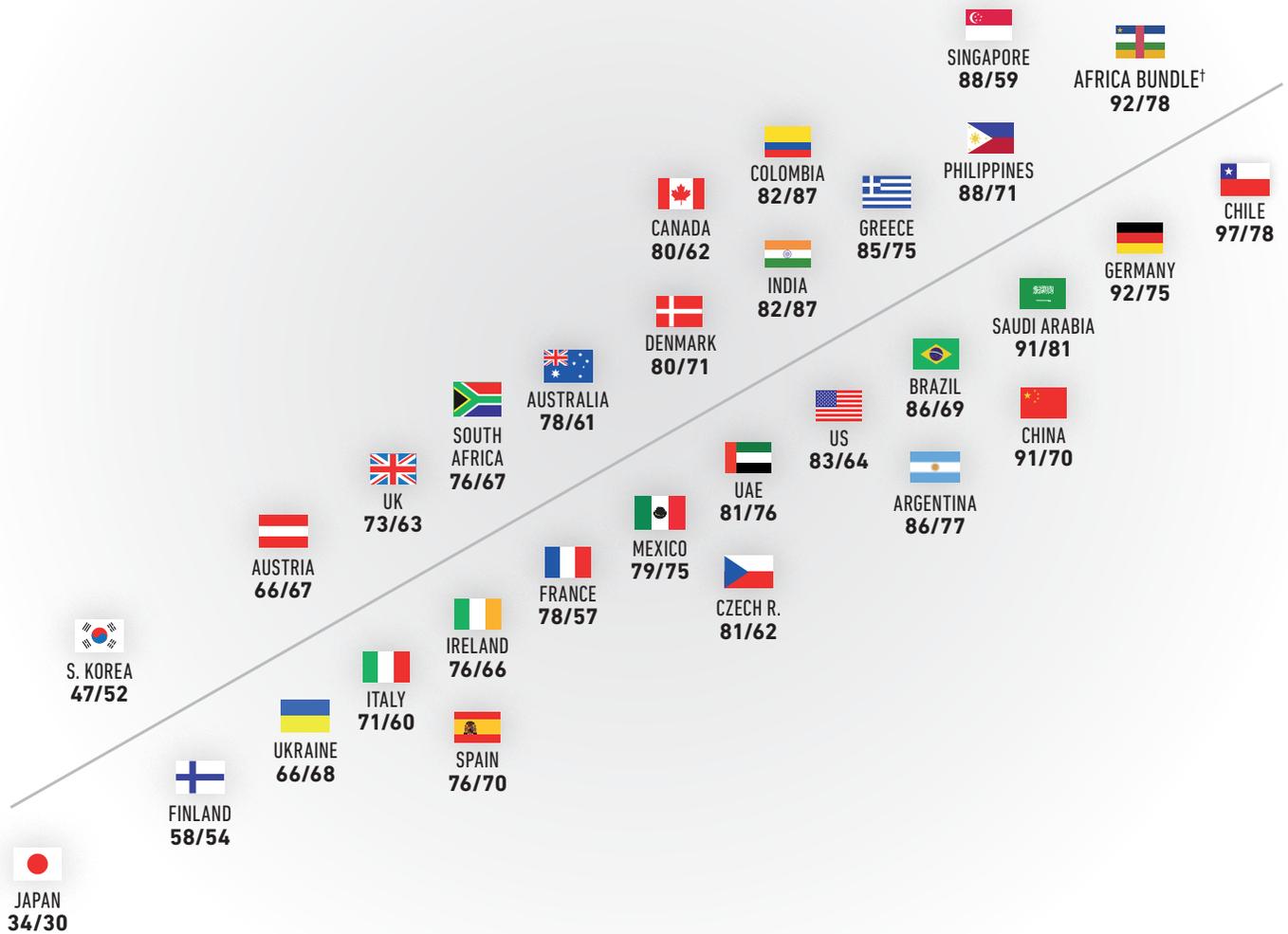
**13%** MAINSTREAM

\*(% agreeing strongly/somewhat)



## I could be happy in a more frugal world

Showing Prosumers/mainstream by country



†Kenya, Ivory Coast, and Nigeria

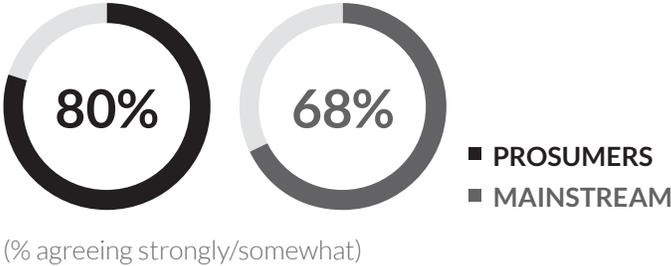


# WE CAN NO LONGER DENY OUR CLIMATE EMERGENCY

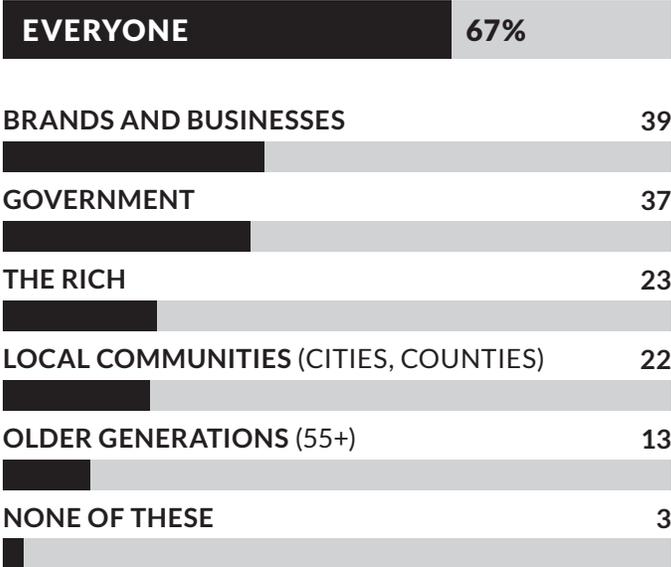
The climate crisis is a critical catalyst in shifting attitudes toward consumption. Every day, we receive messages of our planet spiraling out of control and moving in a potentially cataclysmic direction. Rising sea levels. Extreme weather events. Plastics-choked oceans. Particulate matter in the air we breathe. And a climate refugee crisis that is expected to see some 1.2 billion people **displaced by 2050**. We're well past the point where most people can dismiss the harsh realities of climate change, even if there continue to be sharp disagreements on the best solution.

Eight in 10 Prosumers in our study consider reducing greenhouse gas (GHG) emissions the greatest challenge of our time. And there's no longer a sense that it's someone else's problem. Two-thirds of Prosumers consider climate change a collective responsibility—an issue to which virtually everyone contributes and, thus, bears responsibility for addressing. Interestingly, most don't blame the rich, even though the wealthiest 1% are responsible for **twice the GHG emissions** of the poorest 50%. And while older generations put in place the systems of mindless consumption that may prove our downfall, just 13% of Prosumers think these generations bear the brunt of responsibility for our current circumstances.

## Reducing CO<sub>2</sub> emissions is the major challenge of our time



## Who is most responsible for causing climate change? (showing Prosumers)



As for businesses, they are in the hot seat—and deservedly so, given their **outsized environmental impact**. Perceptions of corporate culpability add to the pressure on businesses to institute reforms and contribute to solutions.

## Despite Widespread Agreement, Tensions Exist

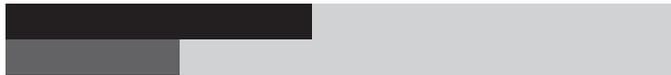
Even as more people seek to live and consume more mindfully, tensions are apparent.

### SACRIFICE VS. INDULGENCE

Not everyone feels ready to tighten their purse strings and live a less indulgent life. After the deprivations of the pandemic lockdowns, Gen Zs, in particular, resent pressure to cut back. It's as if the baby boomers enjoyed a decades-long party, and their grandchildren are left cleaning up the mess. This has parallels with the global south, whose populations **bear the brunt** of climate change despite having done little to contribute to it.

**For me, frugality imposes too many restrictions on our comfort and freedoms (to travel, to consume)**

**46%** GEN Z



**26%** BOOMERS

(% agreeing strongly/somewhat)

**VS.**

**After the pandemic, I will make up for lost time and live my life to the fullest**

**77%** GEN Z



**57%** BOOMERS

Source: Beyond COVID, Havas Group, 2021  
(% agreeing strongly/somewhat)

## YOU FIRST!

Some people also resent knowing that, even as they sacrifice to reduce their carbon footprints, others continue to live wastefully. Fully half of Prosumers feel embittered by their neighbors' unwillingness to do their part. And, as with so many things—intelligence, wit, attractiveness—people tend to overestimate their position on the scale of sustainability. Hence, we see that only 18% of global Prosumers believe their personal carbon footprint is above average for their country.

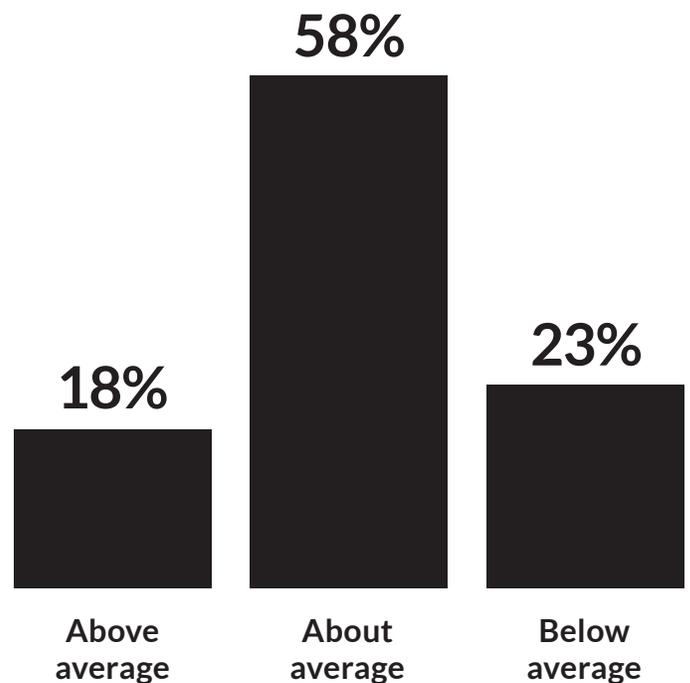
**I get angry when I make efforts and my neighbors don't**

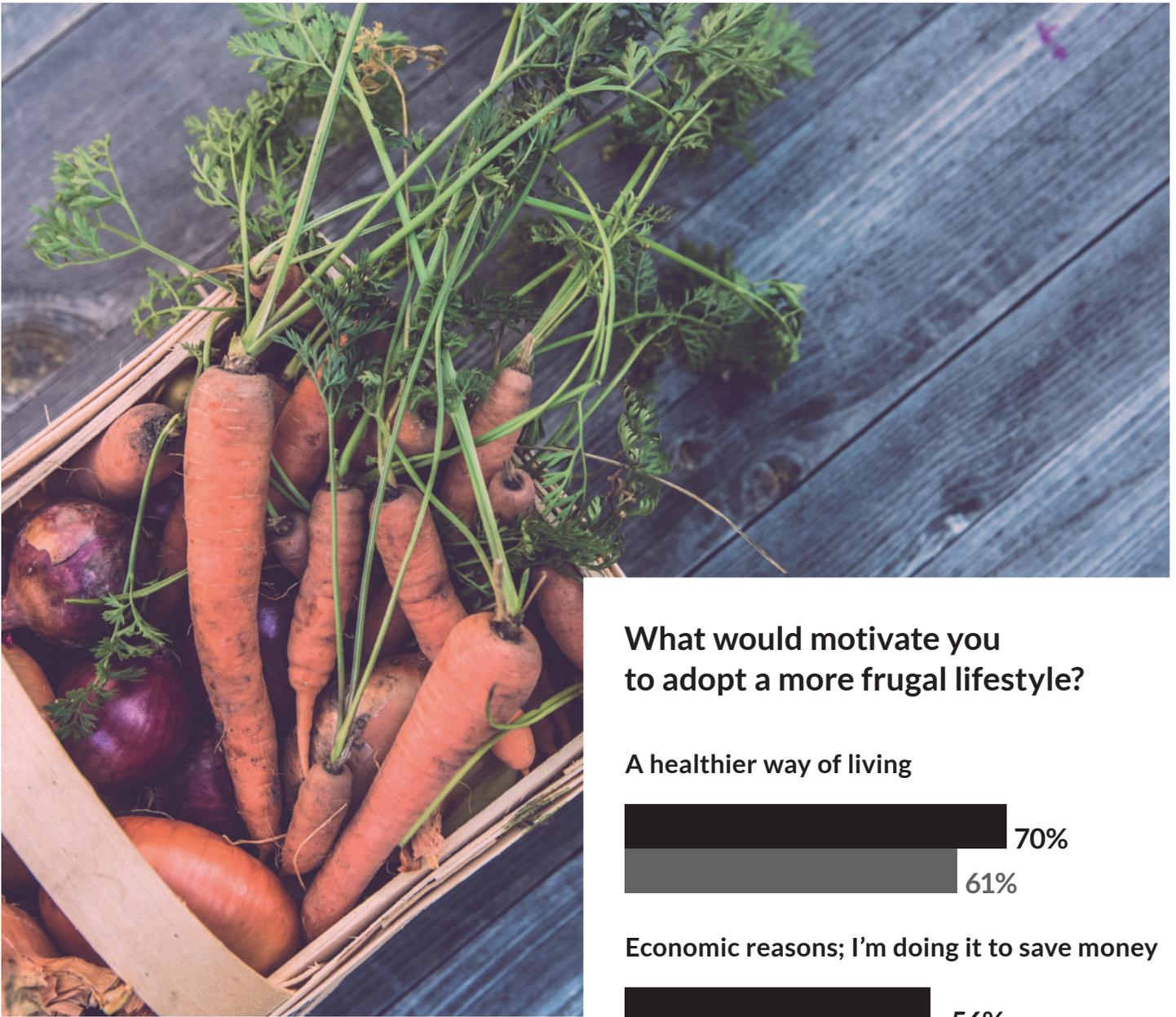
**50%** PROSUMERS



**44%** MAINSTREAM

**How is your carbon footprint compared with the average in your country? (showing Prosumers)**





## What would motivate you to adopt a more frugal lifestyle?

### A healthier way of living



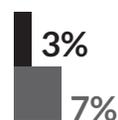
### Economic reasons; I'm doing it to save money



### I'm doing it for the planet



### Nothing would motivate me to adopt a more frugal lifestyle



■ PROSUMERS ■ MAINSTREAM

## ME BEFORE WE

As organizations seek to encourage individuals to reduce their carbon footprints, they would be wise to emphasize personal gains as much as planetary considerations. As concerned as people are about the state of the planet, self-interest is critical. Mainstream consumers, in particular, made clear that frugality is more about living healthfully and saving money than protecting the environment.

Encouragingly, just 3% of Prosumers and 7% of the mainstream contend that nothing could motivate them to adopt a frugal lifestyle.



# How Can Frugality Become a Joyful and Desirable Experience?

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A more frugal approach to consumption is in the interest of society and the planet. But how feasible is that? And just how far are people prepared to go?

## What Are We Willing to Sacrifice?

Our respondents made clear that deprivation and degrowth are not the way forward.

### GROWTH IS STILL THE BEST OPTION

Both Prosumers and the mainstream reject the notion that economies need to shrink to solve what ails us. They want vibrant economies built on innovation and sustainable products and services, not a return to preindustrial times.

**I think economic degrowth is the only solution to climate change**

**26%** PROSUMERS

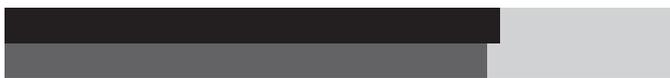


**28%** MAINSTREAM



**I think economic growth is essential to ensure employment for all**

**74%** PROSUMERS



**72%** MAINSTREAM



### DEUS EX MACHINA

“God from the machine.” Most respondents believe the climate crisis is more likely to be solved by new technologies than by a global move away from hyper-consumption. Faith in science and technology is especially strong in the emerging economies of Asia, hitting a high of 72% in China.

**Which of these comes closer to your point of view? (Showing Prosumers)**

The solution to the climate issue will come from...



**New technologies**  
(e.g., hydrogen, geo-engineering)



**A change in civilization**  
(the end of consumption society)

We’re already seeing progress in this area. In its net zero roadmap, the International Energy Agency [cites](#) three innovations—advanced batteries, direct air capture and storage, and hydrogen electrolyzers—as capable of delivering as much as 15% of the cumulative emissions reductions required to meet roadmap targets between 2030 and 2050. By mid-century, however, “almost half of required emissions reductions will call for technologies that are not yet on the market.”



## Back to the Future

For all our faith in science, people hold out hope for consumer-driven solutions, too. It's not about destroying current economic systems but rethinking them and recapturing tenets of earlier models.

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### FRUGALITY IS ABOUT BUYING BETTER...

More than 4 in 10 Prosumers believe people can solve the climate emergency by improving their consumption habits. This includes buying locally and more secondhand goods and moving away from single-use plastics, among other measures.

**For me, frugality is about buying better: more local, more secondhand**

**42%** PROSUMERS



**38%** MAINSTREAM

It's not necessarily about consuming less. The current embrace of secondhand fashion speaks to the impulse toward mindful consumption and to people's efforts to counter the spiraling costs of living. The global apparel resale market is expected to grow 85.5% between 2022 and 2026, to more than \$338 billion, according to [GlobalData](#).

Swedish fast-fashion retailer H&M is one of many brands entering the resale space. On the [H&M RE:WEAR](#) site, customers can buy and sell previously owned items from any brand, not just H&M. Meanwhile, under the banner "Let's change the way we shop," UK department store Selfridges [aims](#) for nearly half its transactions to be resales, repairs, rentals, or refills by 2030.



## ...REDUCING WASTE...

“Waste not, warm not.” Perhaps that should be the new climate action mantra. Two-thirds of Prosumers regard being frugal as eliminating waste.

**For me, frugality is about not wasting anymore (e.g., food, appliances)**

**67%** PROSUMERS



**60%** MAINSTREAM

There’s no denying that waste is a significant contributor to the depletion of our natural resources. According to the UN’s [World Food Program](#), for instance, approximately one-third of food produced each year is thrown away rather than eaten. To counter that trend, [zero-waste cooking](#) is taking hold in the culinary world, encouraged by cookbooks such as [The Everlasting Meal Cookbook](#) (extolling the virtues of leftovers) and [Cooking with Scraps](#) (“Turn your peels, cores, rinds, and stems into delicious meals”). Brands such as [Vejobag](#) help home cooks keep produce fresh longer, while startups such as [Wholy Greens](#) and [Rubies in the Rubble](#) turn fruits and veggies that would go to waste into nutritious food products.

Other brands are helping customers reduce packaging waste. French beauty retailer L’Occitane has set up [Refill Fountains](#) in select cities, allowing customers to replenish their shower gel, shampoo, and other liquids in reusable “forever” bottles. New Zealand’s [Emma Lewisham](#) beauty brand designs all its products to be refilled and even takes in competitors’ empty containers to ensure they are reused or recycled.



### ...CUTTING BACK...

For two-thirds of Prosumers, frugality is about eliminating unnecessary purchases. This poses an existential question for brands, especially in times of crisis and inflation: How can a brand retain a position as an essential purchase rather than a superfluous one that people tend to postpone or eliminate when budgets are tight? Making a product “essential” may have less to do with whether it’s strictly necessary than how much value it brings, including its ability to provide satisfaction and spark joy through factors such as provenance, clean ingredients, and a purpose beyond profits.

For the most part, the sharing economy has yet to live up to its promise. Still, more big brands—including **adidas**, **Decathlon**, and **Ralph Lauren**—are helping shoppers limit purchases by renting rather than owning.

**For me, frugality is about not buying things I don't need**

**65%** PROSUMERS



**59%** MAINSTREAM

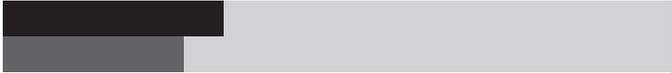


### ...AND BECOMING MORE SELF-SUFFICIENT

The past several years have seen a trend toward self-sufficiency—as evidenced by the rise in home vegetable gardening, bread baking, sewing, and the like. This is largely about cost savings, but it also speaks to people’s sense that younger generations are missing out on essential life skills, from cooking to basic carpentry. A third of Prosumers in our study believe frugality is about making more things oneself.

**For me, frugality is about making more things myself**

**33%** PROSUMERS



**27%** MAINSTREAM

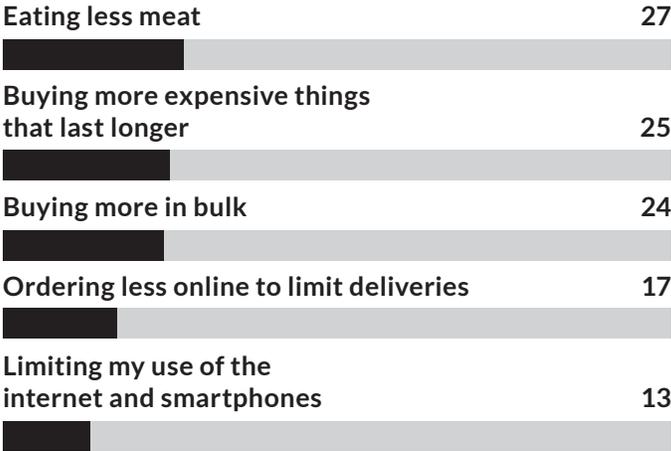
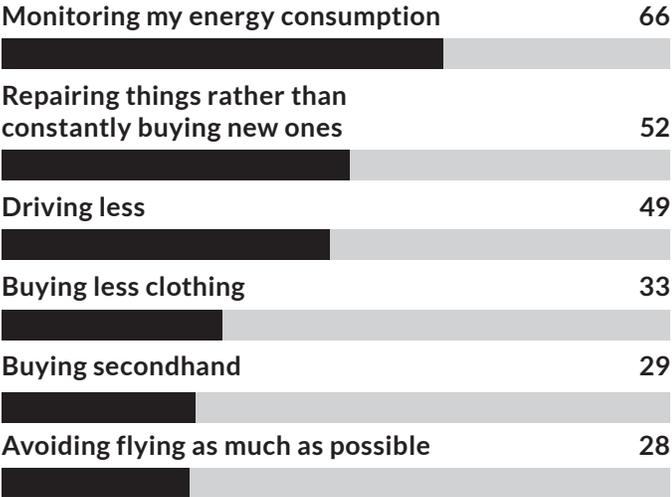
The ability to self-repair rather than repurchase is part of this trend, and more brands are coming on board. Patagonia offers **repair tutorials**, and Apple has launched a **Self-Service Repair** site. Governments, too, are supporting the movement with “**right to repair**” legislation.



## BUT, CONCRETELY, WHAT ARE PEOPLE WILLING TO DO?

The impulse toward conscious consumption is evident, but what are people actually doing in this regard? Most are much more apt to have adopted behaviors that save them money in the short term (e.g., reducing energy consumption, repairing broken items) rather than giving up things they see as making their lives easier or better (e.g., online shopping, smartphone use).

### What are you already doing to reduce your carbon footprint? (Showing Prosumers)



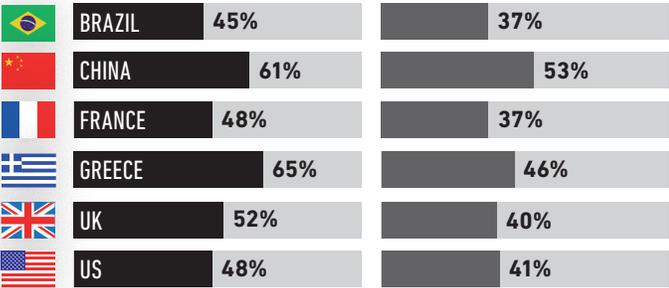


## SOME INTERESTING DISTINCTIONS BETWEEN COUNTRIES

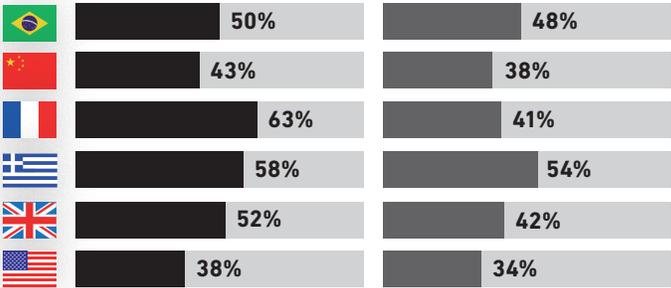
While the French are gung-ho on several scores—from driving less to buying fewer clothes—Americans appear reluctant to make changes with real impact. With so many having only recently entered the middle class, Chinese and Indians also don’t appear quite ready to embrace frugality.

### What are you already doing to reduce your carbon footprint?

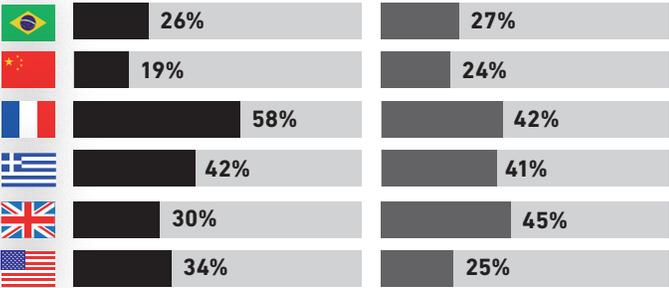
#### Driving less



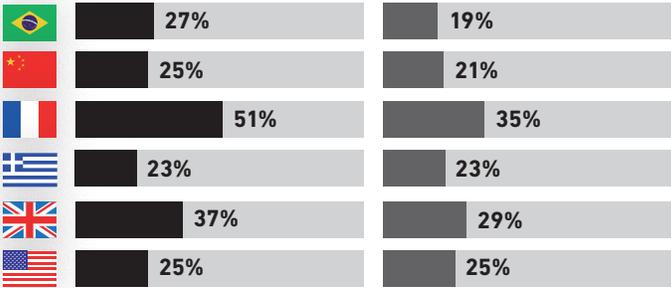
#### Repairing things



#### Buying less clothing



#### Buying secondhand



■ PROSUMERS ■ MAINSTREAM



## PEOPLE ARE READY NEITHER TO GIVE UP MEAT...

Despite the **rapid rise** in plant-based “meat,” people are far more likely to be cutting back on their energy consumption than on their steak and burgers. Like so many things these days, meat has become politicized—as evidenced by the uproar sparked last fall when a French MP **deemed** barbecued steak an out-of-touch symbol of “virility” and the patriarchy. There’s a climate cost to carnivorism that must be addressed, however, with livestock farming **contributing** nearly 15% of all human-caused greenhouse gas emissions.

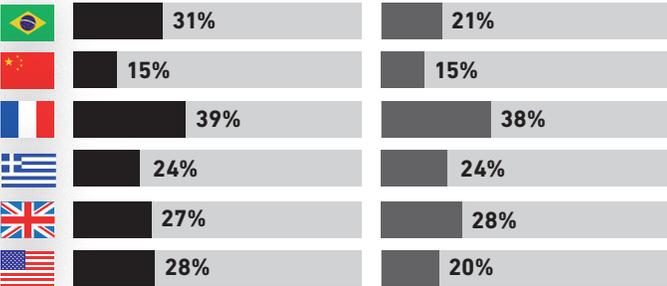


## ...NOR THE PLEASURE OF TRAVELING

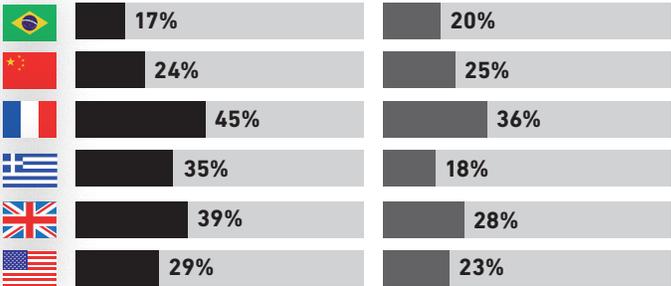
A large majority of Prosumers globally also are not prepared to reduce their air travel to shrink their carbon footprints. France stands out on this question, with nearly half of French Prosumers willing to spend less time aloft—in keeping with their government’s **decision** to ban many short-haul domestic flights to reduce carbon emissions.

## What are you already doing to reduce your personal carbon footprint?

### Eating less meat



### Avoid flying as much as possible



■ PROSUMERS ■ MAINSTREAM

# SACRIFICES ARE HARDER TO MAKE WHEN THE ORDER OF MAGNITUDE IS NOT KNOWN

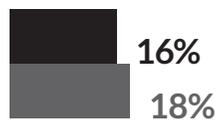
A lack of education is one of the biggest impediments to meaningful climate action. People need to be better informed about the relative impacts of their consumption choices. We see, for instance, that most people globally consider recycling and reducing packaging waste as among the top three actions they can take to positively impact the environment. They don't seem to recognize that other actions—including reducing air travel and meat consumption—would be far more beneficial.

## For me, the actions with the most positive impact on the environment are:

### Recycling my waste



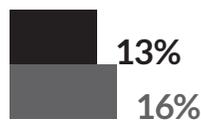
### Eating less meat



### Reducing packaging



### Reducing my air travel



1 plastic bottle  
= **0.17 KG** of CO<sub>2</sub>



1 steak and chips  
= **5 KG** of CO<sub>2</sub>



1 Paris to  
New York flight  
= **2,500 KG** of CO<sub>2</sub>

To progress against climate change, the world's citizens need to understand the consequences of their consumption choices—and that must begin with accurate measurements. What's measured gets managed.

## I'd be more willing to make an effort if I could measure the impact of my actions

**82%** PROSUMERS



**66%** MAINSTREAM

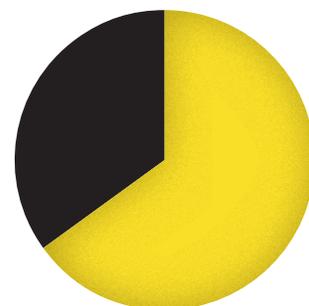


(% agreeing strongly/somewhat)

## MANDATES WELCOME

People are impatient for change on the environment, increasingly aware that time is running out—and so most of our respondents are open to the imposition of rules.

## To reduce our carbon footprint, we must... (Choose one | showing Prosumers)



**65%**  
Impose rules, even hard ones, and not wait for everyone's goodwill

**35%**  
Rely on everyone's goodwill



## FRUGALITY MUST BE A COLLECTIVE MOVEMENT

We've reached the point in the climate crisis at which most people—Prosumers especially—are ready to act. Our study makes clear that this must be a collective movement, not something left to fringe activists.

### Everyone should make the same effort to achieve a more frugal lifestyle



### To live better in a more frugal world, it is necessary that everyone gets involved and shows solidarity



### If I saw more people getting involved in the fight against global warming, I would want to do more



■ PROSUMERS ■ MAINSTREAM  
(% agreeing strongly/somewhat)

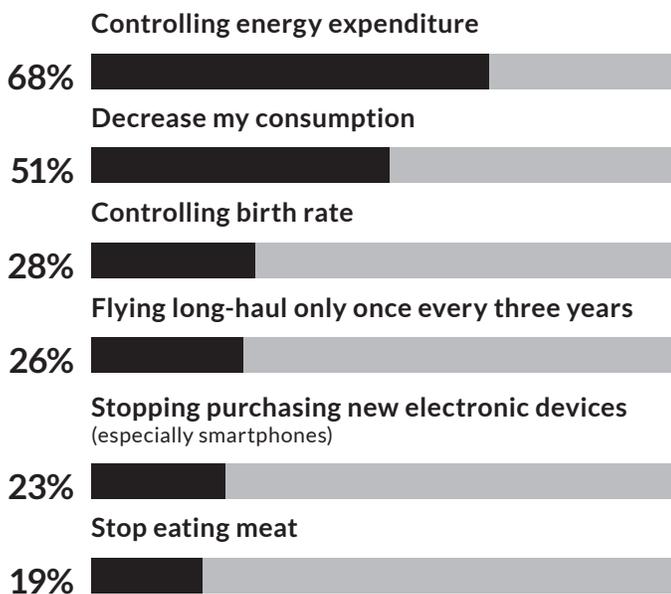
It's important that drivers of any such movement emphasize the positive. Once populations have given up on climate progress, why bother to act? Solutions don't require peer pressure so much as peer positivity. People need reason to hope.

More than 3 in 4 Prosumers say that seeing other people committing themselves to climate action would make them more likely to change their habits. Even more Prosumers—91%—say that living better in a more frugal world requires that everyone get involved.

Once again, we see that people are more willing to reduce their consumption generally than swear off particular behaviors such as eating meat and upgrading their smartphones.

### If your government were to impose hard rules, which of these would you be willing to accept?

(Showing Prosumers)



The reality is that people are surrounded by messaging every day that encourages them to spend and indulge. What if marketers instead focused on selling restraint? How can people be made to feel just as good about what they don't buy as what they do?



# How Can Brands Drive Frugality?

There's a disconnect between big businesses' contributions to climate change versus to climate solutions. Whereas around 4 in 10 Prosumers believe companies bear the most responsibility for climate change, just 8% think they're doing the most to combat it.

**Who is the most responsible for climate change?** (showing Prosumers)



**Who is doing the most today to fight climate change?** (showing Prosumers)





## WITH GREAT PROFITS COMES GREAT RESPONSIBILITY

More than 8 in 10 Prosumers believe large companies are best positioned to combat climate change, and more than three-quarters say the most profitable companies should be the first to pay for an ecological transition away from fossil fuels. Inaction has consequences. More than half of Prosumers claim to boycott companies that are not acting in the planet's best interest. Agreement on this statement ranged from just 35% of boomers to 48% of millennials and 44% of Gen Zs.

I believe that large companies are better able to make the changes necessary to combat climate change

**84%** PROSUMERS



**69%** MAINSTREAM

The companies making the most profit should be the first ones paying for the ecological transition

**77%** PROSUMERS

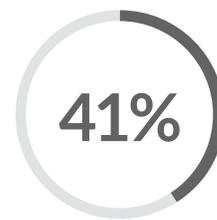


**67%** MAINSTREAM

I boycott the products of companies that do not act for the climate



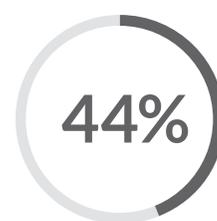
Prosumers



Mainstream



Millennials



Gen Zs



Boomers

(% agreeing strongly/somewhat, global totals)

Can brands undo the harm they've caused by leading consumers in a better direction?



## It's Time to Invent New Narratives for Frugality

Temptation is created by brands and their marketers, and that means we're uniquely positioned to channel that desire into a less harmful direction for people and the planet. We can do this by informing consumers and creating meaningful connections.

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### STEP 1: EDUCATE

Just under 7 in 10 Prosumers consider education key to the fight against climate change.

**Regarding the fight against climate change, I personally support education**

**69%** PROSUMERS

**58%** MAINSTREAM

We saw earlier that 82% of Prosumers would be willing to do more for the environment if they could measure the impact of their actions. Enter: Klarna. In 2021, the Swedish fintech app launched a **CO<sub>2</sub> Emissions Tracker**, enabling users to track the emissions produced by their purchases. Over time, users receive an easy-to-understand visualization of their carbon footprint, allowing them to make more mindful choices. Similarly, with its **Vegetarian Calculator**, Unilever's The Vegetarian Butcher shows potential customers the impact switching from meat to plant-based alternatives would have on their carbon footprints.



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## STEP 2: MAKE SIMPLICITY DESIRABLE

In a world marked by chaos and upheaval, simplicity is highly attractive. Consider modern design trends: They're all about natural elements and white space—evoking sensations of calm and order. Around three-quarters of Prosumers and mainstream consumers say that being satisfied with simple things makes them happy.

**What makes me most happy is being satisfied with simple things**

**74%** PROSUMERS



**74%** MAINSTREAM

New research is uncovering hyper-consumption's psychological and social costs and tracking a movement in the opposite direction. Canadian political scientist Krzysztof Pelc [argues](#), for instance, that conspicuous consumption no longer carries the benefits it once did in the most highly developed economies. Rather than social status and insider knowledge, it now signals vulgarity and lack of character. The emerging notion is that limiting how much “stuff” we accumulate will make individuals happier and society more equitable.

In the world of fashion, we can see this new way of thinking in the movement toward “forever” garments: classic pieces designed to last years, not just one season. Sustainable clothing brands such as [Organic Basics](#) and [Known Supply](#) prioritize durable, ethically sourced fabrics, simple silhouettes, and muted colors that will serve as well a decade from now as they do today.



### STEP 3: CREATE CONNECTIONS TO NATURE

For nearly two-thirds of Prosumers, a frugal lifestyle means living closer to nature. Our increasingly screen-mediated, artificial worlds have left people feeling disconnected from the natural world—its elements and its rhythms. One response has been the rise of **Cottagecore**, an aesthetic that celebrates an idealized rural existence. Think English country cottages. Extending to **fashion, home décor, cooking, gardening,** and **architectural style**, the trend is especially prevalent among younger generations.

### What would make you desire a more frugal future?

A life closer to nature

**63%** PROSUMERS

**53%** MAINSTREAM



### STEP 4: CONNECT PEOPLE

Consuming more mindfully also means rejecting the rat race of the past half century. For most Prosumers, the ability to work less and spend more time with family is part of the appeal of frugal living. In recent years, studies have **documented** a correlation between working fewer hours and lower emissions.

### What would make you desire a more frugal future?

A life where we work less and spend more time with our families

**55%** PROSUMERS

**50%** MAINSTREAM

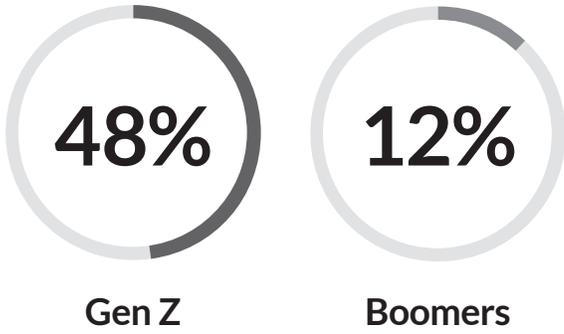
There's plenty of scope to create connections between people via the sharing economy. As one example, the **Olio app** allows users to offer to or receive from community members free food that would otherwise go to waste, as well as household items that are no longer needed. With some 7 million participants worldwide, the app also has 86,000 volunteers who "rescue" unsold food from local businesses to share with those in need.



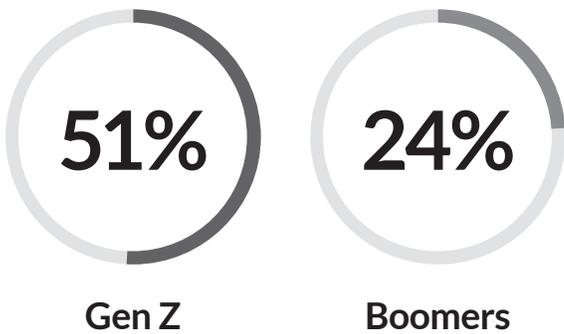
# Frugality as the New Cool

Temptation still holds power, especially among the young. Around half of Gen Zs—versus fewer than a quarter of baby boomers—find it difficult to resist the temptations the consumption economy presents. This can be exacerbated by social media depictions of the “good life” and resentments stemming from other people not doing “their part.” These residual attitudes appear likely to change as frugality becomes the new “cool.”

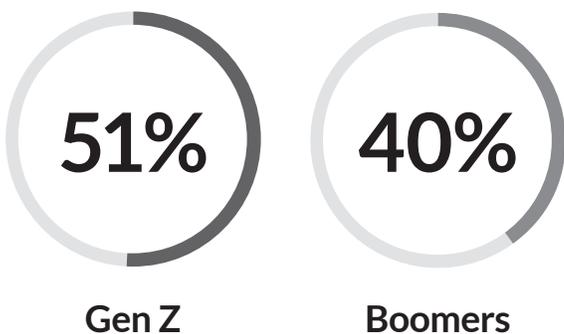
People who share their incredible lives on social media make me a little envious



I find it difficult to resist the temptations that consumption society presents to me



I get angry that I must deprive myself while others continue to spend and pollute without consequence



(% agreeing strongly/somewhat)



## CELEBRATING NEW ROLE MODELS

The past couple of decades have seen the birth of online influencers, many of whom celebrate **excess, wealth, and privilege**. Now, we're seeing a countertrend with the rise of anti-consumption influencers. TikTok's **#deinfluencing** tag spotlights overhyped products that fail to deliver, while YouTube has an "anti-hauls" section that showcases products people are refusing to buy, sometimes because of their eco-impact.

More than 8 in 10 Prosumers and two-thirds of the mainstream claim to admire people who have transitioned to a more frugal lifestyle. We can see this impulse in such trends as the rise in **tiny homes** and TV content about **homesteading and minimalist living**.

I admire people who have made the transition to a more frugal lifestyle

**82%** PROSUMERS



**67%** MAINSTREAM



## FRUGALITY AS A SOURCE OF PRIDE

London-based [Depop](#) bills itself as a “community-powered fashion ecosystem that’s kinder on the planet and kinder to people.” The peer-to-peer social e-commerce company aims to shape global culture for the better by making it safe for people to express their full selves and engage with sellers and buyers who are inclusive, diverse, progressive, and creative.

Brands such as Depop tap into Prosumers’ pride in living frugally and mindfully. We’re now also seeing a rise in apps that let people compare their eco-progress against that of others. Australia’s [One Small Step](#) app, for instance, assesses each user’s carbon footprint and compares it to that of the average citizen in that location. It aims to “[decarbonize] humanity through mass climate

behavior change,” inviting users to collectively reduce 1 million tonnes of greenhouse gas emissions through lifestyle and behavior changes. The UN’s [ActNow](#) app employs the same sort of peer positivity to encourage users to make better choices for the planet. Participants can engage in group challenges to expand their impact.

**It makes me proud to have a more frugal lifestyle while others continue to consume without counting**

**66%** PROSUMERS



**53%** MAINSTREAM

(% agreeing strongly/somewhat)



# Closing Thoughts for Brands

Whether practicing frugality or pursuing a luxurious lifestyle, consumers respond to the same motivations: They want to feel good (internal motivator), be admired by others / look good (external motivator), and derive maximum value and satisfaction from their consumption choices.

For over a century, marketers have been selling a dream that is no longer sustainable—and increasingly less desirable. Rather than enjoy what their money can buy, many consumers feel stressed, overburdened, unhealthy, and dissatisfied.

Businesses and brands have the power—and arguably the obligation—to contribute to a better way forward.

# IN A NUTSHELL: ISSUES RAISED

**1.** Combatting climate change is everyone's responsibility—and every citizen must act.

**4.** The world's citizens are open to new rules mandating more sustainable choices.

**2.** Limiting our energy use is not nearly enough; people must embrace a new mindset and radically different consumption habits.

**5.** At present, brands are seen as accountable for the state of the planet and not nearly proactive enough about contributing to solutions.

**3.** Our messaging and brand offerings must be far more compelling to persuade people to make fundamental sacrifices such as reducing their meat consumption and air travel.

**6.** **Frugality can become desirable and joyful provided it...**

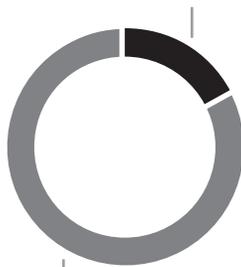
- Is part of a collective movement
- Evokes feelings of solidarity
- Is bolstered by brand narratives championing simplicity and essentiality, and elevating those who have elected to live more frugally

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## About the Study

In the first quarter of 2023, Havas partnered with Market Probe International to survey 12,929 people ages 18+ in 30 markets: Africa bundle (Ivory Coast, Kenya, Nigeria), Argentina, Australia, Austria, Brazil, Canada, Chile, China, Colombia, Czech Republic, Denmark, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Mexico, the Philippines, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Ukraine, the United Arab Emirates, the United Kingdom, and the United States.

The survey sample was made up of **17% leading-edge Prosumers**



and **83% mainstream consumers.**

## Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

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