



France 2012,
society with no regrets.

NOBODY'S UNPREDICTABLE



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society with no regrets.

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[Lead-in]

Ipsos Flair grew from a desire to combine the six areas of expertise Ipsos offers (Marketing, Advertising, Media, Opinion, Customer Relations, Data Collection, Processing and Distribution), in order to present a vision of society based on the observation and interpretation of the behaviors, attitudes and opinions of consumer citizens.

Initially launched in France in 2005, Ipsos Flair spread to Italy in 2010, then China in 2011.

The three big events of 2012:

- In China, the Year of the Dragon and Ipsos' tenth anniversary in this country-continent.*
- In Italy, the first year without Silvio Berlusconi at the helm of the country since 1994.*
- In France, a new presidential election.*

Three high points, three stories, three perspectives and a specific angle: approaching research findings as symptoms whose analysis allows us to create a mapping of structuring, emerging trends.

In France, our saga has become "extra-lucid" with the Dominique Strauss Kahn affairs, the Arab revolutions, the Greek and Italian crises, the hypothesis of Europe-wide bankruptcy, etc., like a "son et lumière" show that is increasingly contrasting and fast-moving.

Between amazement, hallucination, hope and irony, secrets and outpourings, hope and further disappointments, the French have experienced a roller coaster ride of a year that has somewhat altered their moods, with the news taking on a psychedelic twist.

This presidential election is different from the others, with the stakes combining the weight of the past, a desire for the present, and the role of the future. These notions obviously have an influence on the strategies of the players involved, but also on the strategies of brands, media, and companies.

2011 saw the culmination of nostalgia and protectionism, while revealing a desire to make the most of the present day in a different way. 2012 raises the question of the future. Does it represent progress, or definitively, a problem?

The answer given by brands is simple: move ahead with no regrets. "Born of future ideas," "A new era has begun," "New thinking, new possibilities", "Let's enter the world afterwards"¹.

The answers given by politicians are more complicated because all the rhythms overlap: the financial situation is making political programs outdated, imposing unpopular choices at a time of electoral promises, disrupting or toughening programs.

And the winner will be? The one who manages to establish the idea that the days of eternal regrets are behind us.

Jean-Marc Lech

PS:

On the cover, our vision of a society with no regrets.

¹ LG Optimus black, Hyundai, VW Passat, Ademe.

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[User's guide]

*"My finest memories
are those of the future."*

Salvador Dali

[2011, extra-lucid year]

Clapperboard

The basic themes of the news were fairly repetitive in 2011, but they spiraled into an increasingly complex fugue: the Dominique Strauss-Kahn (“DSK”) affair, the debt crisis in the euro zone, the regime changes in North Africa.

For months, each of these themes was taken up again, started over, developed, deformed until all available space was filled, echoed by every available voice. Providing a break were a few distractions, such as the Primaries organized by the Socialist Party, or the Rugby World Cup.

But basically, there were three endings: one for candidate DSK. One for a serene Europe. One for the Arab Springs, with Sharia law dictating the Egyptian, Tunisian, Libyan and soon Syrian constitutions.

The French watched the spectacle of the DSK affair as “**extra-lucids**,” somewhere between daydream, smutty Punch and Judy show, absolute consternation, exhaustion and excitement.

Originally, our term “**extra-lucids**” was not meant to define a trance state, but rather the attitudes of a society:

“**Extra**,” because the French watch from the outside, the side, the top, they don’t project into what they see but rather they observe, decode, watch coldly, looking for the trap, thinking that whoever is issuing the message wants to con them, most of all.

“**Lucid**,” because they feel more enlightened, they experience the illusion of transparency, with all information types simultaneously accessible, producing three effects:

- Wearing out words very quickly (“toxic,” “dysfunctions,” “owing explanations,” “restructure” are unbearable to hear)
- Creating disarray at times of personal decision (we saw this with the small number of French people who got vaccinated during the H1N1 virus episode)
- Expecting clear, direct, unquestionable instructions.

And the plural “**s**” to represent the diversity of beliefs and values, power struggles, issues that unite or oppose generations, ethno-cultures, communities, working and non-working people, subscribers and beneficiaries.

It started out so well

Dominique Strauss-Kahn presented his candidature on June 28th, 2011, won the Socialist Party primaries, maybe from the first round on October 9th, definitely on the 16th.

Confronting him, a Nicolas Sarkozy jostled in the polls, grasping onto his electoral base (scarcely 1/3 loyal voters), dropping in the polls, abandoned by public opinion: on July 19th, 66% of French people claimed that they did not want him to run.

After a rapid campaign, capitalizing on the skills he acquired as head of the International Monetary Fund, convincing as to the benefits of globalization, rich in prospects for restoring confidence to the French people, inspiring a renewed form of democracy, Dominique Strauss-Kahn is elected President of the French Republic on May 6th, 2012.

It is the return to power of the Left after three lost presidential elections, the bling-bling Right is humiliated, the UMP party is floored, Nicolas Sarkozy is – finally! – leaving.

Another 28.06: this one the number of Dominique Strauss-Kahn's suite in a hotel, the New York Sofitel. The place he is said to have sexually assaulted a chambermaid on the morning of May 14th. Another calendar: his arrest at JFK at the Air France terminal in the afternoon, door 4, flight 23, his transfer to the Manhattan Police Department, his hearing in front of a judge.

Other images went global: nighttime, handcuffed, gripped firmly by the arm between several plainclothes policemen. His incarceration at Rikers Island, New York State Prison. Next, under house arrest in south Manhattan, with an electronic bracelet and under surveillance by a security agency.

And other words, other figures, not covered in the Socialist Party program: 1 million dollars in bail, 5 million dollars in security deposit to authorize his release from jail, 50,000 dollars in monthly rent for his stay in a private mansion in Tribeca.

And a few reminders, in passing: DSK's net income, the Marrakech Riad, the wealth of his wife Anne Sinclair, granddaughter of art dealer Paul Rosenberg.

Unrest within the socialist ranks, from all points of view... for example, \$50,000 = € 35,000 = 24 monthly minimum wages in France.

Extreme unrest develops when the idea spreads that *"everyone knew"*... Knew what? That DSK was a pervert, deranged, a sex maniac, etc. That no one said anything. That there had been complicities, silences, that he's not the only one guilty of harassment, that there will be pre- and post-DSK periods within the corporate world, in political life, in all mixed gender situations, since women everywhere are prey to the dominant males, wounded by male libido. Or that no one knew anything?

Outpourings

“The DSK affair” untied tongues, about sex first and then about money. Libertine or predator? Socialist and husband of a billionaire? Left-wing and friend to the wealthy? Like us or like them?

In its wake it brought other revelations, such as the placing in custody and indictment of Georges Tron (UMP party, deputy mayor of Draveil), his resignation from the post of Secretary of State for Public Service, accused of rape and sexual assault by a person in authority.

It removed the guilt from the rumors, with philosopher Luc Ferry claiming on May 30th to the Grand Journal on *Canal+* that a **“former minister had been nabbed in Marrakech partying with little boys [with himself having] testimonies from cabinet members and State authorities at the highest level”**.

After being summoned by the juvenile protection brigade of the Parisian criminal investigation department, it was the turn of a Moroccan district attorney to present a letter rogatory to the Paris Public Prosecutor’s office to hear Ferry, the author of **“La Révolution de l’Amour”** (Plon) provide more details on the subject.

The **“Porsche scandal”** should have alerted us already: in early May, Dominique Strauss-Kahn and Anne Sinclair were photographed next to a Porsche Panamera S. The image immediately generated a huge buzz, ironically commenting on the Left’s candidate and his relationship with luxury.

It was soon revealed that this was actually the administrative vehicle of Ramzi Khiroun, special advisor to Arnaud Lagardère, spokesman for the Lagardère group and member of its executive committee, also an advisor to DSK at the IMF in 2008²² and one of the Presidential candidate’s special contacts.

Result: the idea that DSK lives in a world different from others, that he doesn’t really know the French people, that the words **“crisis,” “restrictions,” “rigor”** are foreign to him or – worse – indifferent. And also that it would be hard for him to criticize anything in Nicolas Sarkozy when it comes to moderation and simplicity.

The major collateral damage that eliminated Dominique Strauss-Kahn from the presidential election is revealed here: his lifestyle, even more than his morals, has nothing in common with the lifestyle of most French people, he lives in another world, beyond the bling-bling, beyond good or evil, ultra-sex and **“ultra-caviar,”** as Pierre

² In 2008, the borderline had been crossed with the investigation into a possible abuse of power linked to the extramarital affair the IMF Director had with a former executive of Hungarian origin, Piroska Nagy.

Lellouche put it in February 2011.

So how could he understand **“the people”**? What can he know about their lives, their expectations, except through the occasional opinion poll score?

What were we to think, when Anne Sinclair stated in October **“I was not exempt from criticism”** in her biography (**“Anne Sinclair, femme de tête, dame de Coeur,”** Marc Tronchet & Alain Hertoghe, Calmann Lévy)?

Twists and turns

July 1st saw dramatic turn of events no. 1: emergency hearing.

The investigation report sent to the District Attorney’s office in New York called everything into question: Nafissatou Diallo was described as a discreet, timid and pious Muslim chambermaid, scarcely able to speak English, raising her child by herself, an admirable mother, the devastated victim of a vile monster.

She lied. There was no immigration file for her arrival in the US, an illegal immigrant, who had claimed a second child in her care in order to enjoy tax benefits, she also under-evaluated her income to keep her apartment.

She held a number of bank accounts, with over 100,000 dollars deposited in cash, she also spent large sums on her five phone accounts, notably for calling a prisoner in Arizona.

Her description of the rape turned out to be contradictory, according to which version she gave. In one, she was discovered lying in a closet, in another, she was cleaning another room just after finishing Dominique Strauss-Kahn’s suite.

The final nail: she claimed she had never seen DSK (whose picture was displayed, as is the case with any VIP, in staff quarters), whereas a conversation she happened to have with her friend jailed for drug trafficking reveals statements such as **“don't worry, this guy has lots of money. I know what I'm doing,”** a friend she claimed was her husband³...

And as if that wasn’t enough, Nafissatou Diallo was said to be an occasional prostitute, who wanted revenge on Dominique Strauss-Kahn because he refused to pay for her services. How credible are her accusations against a man who had to resign from his post as Managing Director of the International Monetary Fund and abandon his

³ This inmate contacted on May 14th is a member of the gang that made the payments in cash onto her account.

candidacy to the Presidency of the French Republic?

Everything or nothing? Everything, because a rape victim isn't asked to provide a certificate of morality, a sexual assault is a crime, period. Nothing, if lying is Diallo's way of life.

The outcome: positive but not enough to get back in the race: the judge lifted bail conditions (no more house arrest), and DSK was placed under judicial review only. Anne Sinclair recovered the bail and the dollars, but Dominique Strauss-Kahn's passport was not returned.

On July 8th, dramatic turn of events no. 2: journalist and writer Tristane Banon pressed charges for alleged attempted rape, for an incident dating back to 2003.

On the 17th, dramatic turn of events no. 3: Banon's mother, Anne Mansouret, socialist Vice-President of the General Council of the Eure department, is heard by the investigators. She reveals that she herself had a sexual relationship with Dominique Strauss-Kahn in the early 2000s and commented: ***"a relationship with consent but clearly brutal,"*** with DSK displaying the ***"obscenity of a boor."***

The 19th, dramatic turn of events no. 4: Brigitte Guillemette (DSK's second wife) presses charges for ***slander against the mother of Tristane Banon because "everything Anne Mansouret said is false"*** and that she ***"never dissuaded Tristane Banon from bringing suit."***

The 21st, dramatic turn of events no. 5 and no. 6: whereas her lawyer refused to have her testify so as ***"not to be used as a tool by the US justice system,"*** and she herself did not want her case to be associated with the procedure underway in the USA, Tristane Banon announced that she would speak under oath in front of District Attorney Vance should he request judicial cooperation between the US and France.

And after François Hollande, it was the turn of socialist party member of parliament for the Moselle, Aurélie Filippetti, or TV journalist Patrick Poivre d'Arvor, to have their say as part of the preliminary inquiry opened by the Paris Public Prosecutor's Office.

In late July, Nafissatou Diallo gave an interview to Newsweek and ABC, and spoke at a public press conference in Brooklyn...

For some, a PR operation with an actress, a puppet even, for others the testimony of a woman devastated by an attempted rape, forced fellatio and her silent escape, for fear of losing her job.

In early August, attendants on flights frequented by Dominique Strauss-Kahn were

asked to testify by the attorneys for the plaintiff, to ascertain whether they felt they had been **“disturbed, bothered, assaulted by any form of inappropriate behavior.”**

A new rumor emerged: only male staff members were authorized to approach him to avoid any theoretical temptation.

On the 8th, Nafissatou Diallo filed a civil suit against the former head of the IMF, with a view to obtaining punitive damages, in addition to the usual penalties corresponding to the **“sadistic assault,”** thereby giving up on waiting for the outcome of the criminal procedure.

The situation became more complicated for Dominique Strauss-Kahn on August 16th, when the medical report produced by the hospital where Nafissatou Diallo had gone to the ER concluded with **“Diagnosis: assault. Cause of injuries: assault, rape.”**

But since all dramatic turn of events are included in this **“political opera,”** on August 23rd, Dominique Strauss-Kahn was freed, the **recommendation for dismissal** accepted, the charges abandoned due to the series of lies told by Nafissatou Diallo.

And he was back in Paris on Sunday September 4th, with a welcome worthy of Lady Diana, police cordon, cameramen on motorbikes from the airport to the Place des Vosges, and press escort.

Note that while 80% of French people claimed to be tired of the soap opera, they had trouble tearing themselves away: *BFM TV* attracted 13% of the viewing audience on that famous Sunday (anniversary of the 3rd Republic) between 7:00 am and 9:30 am, as opposed to 9.6% for *TF1*, 6.4% for *France 2*, 8.5% for *France 3* and 2.8% for *M6*, peaking at 21% at the moment when Dominique Strauss-Kahn and spouse arrived at Roissy Charles de Gaulle airport.

Likewise, when *BFM TV* broadcast an exclusive showing of the New York Sofitel surveillance videos on December 8th, 10 million people tuned in to watch

In the next episodes:

- The civil action filed by Nafissatou Diallo in New York,
- The dismissal of the charge of attempted rape in 2003 brought by novelist Tristane Banon (the events were outside the statute of limitations, however the Paris Public Prosecutor’s Office considered that there had been a sexual assault, but not attempted rape),
- The preliminary inquiry opened by the Pontoise Public Prosecutor’s Office for an attempt to bribe witnesses in Sarcelles,
- The involvement of the former Socialist Party candidate in “sex parties” in New York, Paris or Lille, a huge aggravated “pimping” scandal involving an attorney, the head of urban security for the city of Lille, trips made by prostitutes to the IMF, etc., etc.

- The return of the theory of a plot organized by the UMP party in December.

This interminable sequence was the high point, but not the crowning piece, in the saga of defiance that Ipsos Flair has been describing since 2005, and which now places Dominique Strauss-Kahn in last position in the *Ipsos Le Point* Barometer of political action.

[Line of sight]

From defiance to a desire to turn the page and move on to something else, the temptation is great enough for 2012 to start with a basic trend: couldn't care less. *"I'll tell you something, I couldn't care less that it wasn't a good match, or whether the Welsh deserved to be in the final more. We're in the final and that's all that counts."*

In October 2011, this analysis by Marc Lièvremont, trainer of the French rugby team, outlined the road ahead: it was a perfect synthesis of the culture of the result (by whatever means) and its strictly egocentric nature.

Far from the couldn't-care-less aesthetics of a Jacques Dutronc, and closer to **"Chacun pour soi, Dieu s'en fout,"** ("Every Man For Himself, God doesn't Care") by François Dupeyron (Éditions Léo Scheer, 2009), but still light years away from **"Fuck It: The Ultimate Spiritual Way,"** by John C. Parkin.

Next, let's not be surprised at the difficulty in socializing and managing an employee-consumer-citizen encouraged in his **ego-system** by the whole marketing, advertising, or even political environment, when **"care"** was the credo of Martine Aubry.

Which leads us to the basic questions that Ipsos Flair invites you to visit and which will determine the insight governing the choice of the new French President, but more than that:

- **2012, society with no regrets?** Which explains why regrets are no longer eternal.
- **Resiliencies,** which explores the new attitudes of the French.
- **Consequences,** which reviews the attitudes of consumer-citizens and the scenarios to be built for marketing, corporate or advertising strategies.

INTERVIEW Yannick Carriou, Ipsos France

What do you think is significant in the marketing and political news of 2011?

One of the last marketing anecdotes of 2011 concerns Coca-Cola's retraction in the USA, which is something completely new. The company had to remove its new white, special edition cans from the shelves. Not only were they upsetting consumers accustomed to the brand's eternal red, but there was also the risk of confusion between this classic Coca-Cola and the "light" version of the same drink, which is also sold in a light grey pack. Besides demonstrating the consumer's power, this story shows how you can be competent, without necessarily being legitimate. No one doubts that Coca-Cola is on top of its game when it comes to marketing and, in this case, it had come up with a winning cocktail. With an attractive packaging in wintry colors, very visible, support from the WWF and the noble cause of saving polar bears, it was all designed to make this idea one of the successes of the Christmas period. Yet who is Coca-Cola to disrupt the order and habits of the American refrigerator? Refrigerators, or at least their owners, were not going to be taken in and disputed the brand's right to force a shift in their habits.

Dominique Strauss-Kahn provided us with the raunchiest news story of the year. At the very height of his popularity, with polls emphasizing the immanent competence invested in him by the French people. Economist, minister, left-wing politician and the head of the IMF, Dominique Strauss-Kahn appeared to be the missing link between the man in the street and the complexity of the modern world. The one who finally had the ability to reconcile everyday life and control of the systems. "He understands, he will know." And then came all the rest. The disputed parts, but also the parts indisputable and confessed. All of which made the man illegitimate to set his sights on the highest post in the French Republic. He may not have mechanically lost his competence, and he did try one Sunday evening on the TF1 channel to remind everyone of that, but it was no longer audible, through a lack of legitimacy. After that came the long silence that has lasted until this day. Competent to analyze, sure, legitimate to speak, "no" says public opinion.

Are politicians legitimate in the sense that, beyond the possession of technical skills, they use those skills to improve things for citizens? Are brands legitimate in the sense that, beyond the possession of technical skills in developing and distributing products, they use those skills to bring their consumers a positive experience and a sense of well-being?

Is the debate over legitimacy more heated than in the past?

With poison in baby bottles, harmful medications complacently prescribed as appetite suppressants, electoral promises scorned, ministers indulging in sex parties and a few scandals mixed into public life, doubts are being expressed more openly than in the past.

The gap between competence and legitimacy is everywhere and will probably structure a large part of the debates between citizens and any form of authority in the future: whether in politics, economics or marketing. It could even lead to a society painfully stretched between experts, once known as “elites,” persuaded of their own competence, and a mass of citizens or consumers who, based on the facts and results, will contest their authority. The consequences of this struggle are known in their nature, unknown in their scope: disinterest, distancing, abstention, ... or extremism, exaggeration, conflict. Like the “indignés” (the French version of the “Occupy” movement) doing nothing other than wait for an “economic Godot” on the streets of European capitals. Or the Greek or British protestors whose anger exploded into violence. All of them, the sincere ones in any case, say the same thing: the ones at the very top claiming to be competent have lost their legitimacy.

So confidence in the elites has been lost?

*Sociologists and philosophers who have theorized about the ways to get out of the crisis (from Edgar Morin - La Voie - to Pierre Rosanvallon - La Société des Egaux) have almost all called for a large-scale revision of the way our societies function. Yet political projects are still largely rooted in the hackneyed implementation of technical skills acquired and deployed within a system that is wavering and splintering. The European treaty project gives 26 countries a reinforced framework for budgetary discipline, and not a new model. A technical response, one that is probably needed, but not a response understood by the people. This has led to the debate on the loss of a sense of democracy in Europe which, to take the examples of Jean-Paul Fitoussi (La Politique de l'Impuissance, Editions Arléa 2005), has gone from “**one man, one vote**” to “**one euro or one dollar, one vote.**”*

How do you see the follow-up and 2012?

This difficulty in using skills to preserve or build strong popular legitimacy is having and probably will have consequences for the months to come.

- The loss of legitimacy by even the most competent authorities will continue to nourish the need for indignation and questioning of the basic workings of the system, with no guilt and no regrets. Everything is possible, notably through a step backwards. We can deglobalize, denuclearize, deliberalize... and – why not? – we can also renationalize, reestablish border barriers, reindustrialize... The political debate is losing its dogmatic way and these “de” and “re” words could create the foundation for the electoral debate of 2012. Dogmas and taboos might well fall on the occasion. The famous “pensée unique” (groupthink) has shattered, embodied by alternative candidacies, or perhaps favorites who, in the end, will adapt their discourse to the shrillness of demands for change, more than they did in the past. Should we have any doubts about the intensity of the change in tone, expectations, ideas and models, seeing the film The Intouchables,

in which a Frenchman of Sub-Saharan origin leaves the whole of France crying tears of laughter, by pushing around a powerless quadriplegic, “emptying his ass” and cutting his moustache “Hitler style,” testifies to the standardization of the breakdown, I think. Although in the example of the The Intouchables, things are a little embellished. This film should be watched with the “self-righteousness” of the 1990s in mind to find its symptomatic value. And this is a popular comedy, not the Fassbinder underground version!

- As concerns brands and companies, we may also have some surprises in store if such powerful arguments of doubt, deconstruction and delegitimization of established ways happen to target them. Hence, the massive change in the SNCF’s train schedules was said to be a technical necessity (another competence issue), but found little legitimacy in public opinion. Being legitimate, not just competent. Most brands can question the legitimacy of the financial effort they ask of their consumers. Banks, distribution, energy companies will need to be on their guard. Of course, the Internet, like a rummaging bloodhound who flushes out everything about everything, both true and false, amplifies the phenomenon. Ask the factory farmer who provides chickens to McDonald’s. If handled badly, this type of revelation could have definitive consequences for brands in the future.

- The legitimacy crisis will nourish the cult of outlying areas, notably on the part of the elites. Symbolically, two of the Arab dictatorships were toppled by popular movements that began in towns far from the capital (Sidi Bouzid in Tunisia, Benghazi in Libya). As though the forces of regeneration or revolt were dormant in the outlying, anonymous areas, ready to awaken. We can clearly sense this belief in the outlying zones, as an element of truth. “La France de Raymond Depardon” tries to use images to access this truth of the provinces. Le Monde, while presenting multiple portraits of ordinary people in provincial towns, ran the headline “Invisible France.” Sociologist Jean-Christophe Bailly travels to locations that “express” modern times in his book “Dépaysement”. In Fractures Françaises, geographer Christophe Guilluy analyzes the difficulties of the fringes of certain provincial towns... The fringe is at the center of debates, ideas, beliefs.. Maybe there is a “political Rousseauism” in there, on a quest for the real citizen with his real consumption problems, but it will be a strong trend. “Normal people’s truth” will surely become a campaign and marketing argument.

[With no regrets]

[Next]

In the end, nothing has changed, no good news on an international, human, universal level. Except for one detail: over time, everything relating to the current economic-social-political situation has become structuring.

Firstly, the Defiance Agenda has set in over time.

“With no regrets” has become the accomplishment of guilt-free infidelity.

Next, on a personal level, the *all-for-ego* mindset has won over for the long-term; living “with no regrets” is hedonism without a complex, with multi-zapping as a vindicated life style that is disconcerting brands, advertising, media.

On a collective level, “with no regrets” can take the form of a commitment to having nothing to regret, nothing to give up. This is a militant version that runs across the political spectrum, from extreme Left to extreme Right.

Finally, regret what? The new generations have experienced nothing that they could regret and “regret-free” phenomena are developing with regard to the values of the previous generations, including the most iconoclastic, sex. But that’s not the only one...

[The defiance agenda]

Words, words

Politicians’ promises are not kept, most brands are finding it increasingly hard to justify how their price is proof of added-value, the media are contested and the *Wikileaks* news sounds more accurate than the TV news.

Nothing new, but too many words that keep looping back, to the point of wearing people out: *“out of the tunnel,” “austerity turning point,” “strong euro,” “reduce the social divide,” “President of purchasing power,” “empty coffers,” “save the banking system,” “H1N1 virus,” “Icelandic volcano,” “chaos of winter 2010/2011,” “speech on the European crisis,” “unemployment or crime figures,” “rate increases in all areas of everyday life,” “new taxes,” “give meaning to austerity measures.”*

The analyses by the same experts, explaining everything and its opposite, clash with the public’s disinterest and their direct consequence is a continuous drop in sales in the *Essays* category in the publishing sector.

New in 2005/2006, the notion of a “**results crisis**” is now a shared diagnosis, ordinary, obvious, and integrated by the players in the consumer society.

Will the consumer escape brands?

At the dawn of 2012, one observation is broadly shared by brands: innovating has become an increasingly difficult exercise, yesterday's recipes no longer work, consumers are changing very/too quickly and may "burn what they have loved, with no regrets..."

But where is the consumer's conscience going within this context of uncertainty?

While unanimously claiming to be struggling to get to the end of the month and to be counting more and more precisely when shopping, paradoxically consumers continue to spend for pleasure, will give in to the temptation of more intense pleasure (luxury products, technological products, brands offering a sensation, a single benefit). The crisis has been this way, or crises, rather. This word, this concept, this reality has punctuated everyday life relentlessly for almost 10 years, one crisis is hardly over before another one comes along. We are moving from "nothing will ever be the same again" to "so what?"

While this type of economic context generates prudence and wariness, consumers are changing to adapt to this new economic environment. Consumption is becoming reasoned (not necessarily reasonable). The consumer no longer consumes "in a straight line," but spends his time slaloming as he pleases, according to his desires, expectations, moods, his need to not miss out on something accessible to him, and lastly, according to the offer he is presented with, with no regrets or probably, so as to run no risk of regretting...

The onset of good sense in consumption means making the most of things today, without placing oneself in a vulnerable position tomorrow. A brand name will be chosen for one type of product, switching to a private label for another type, the cards are being re-dealt, and paradoxically brands are getting their energy back, provided that they have succeeded in adapting, because if not the consumer will make/let them disappear, with no regrets!

2012 consumption, the onset of good sense?

Very definitely. The consumer is trying to get back to some basics simultaneously combining all the trends of the past few years: pleasure, home-made, time-saving, health, conscience...

The construction of value is being transformed, and "good" conscience is becoming almost pivotal in this. At a time when Made in France and the French consumer are making a comeback, consumers are thinking even more "local," more human, want to

know who grows, who makes, who they are buying from; in the end they want to know that their consumption is contributing to maintaining the local economic fabric, to avoid seeing the “corner shop” or local farmer disappear..., to avoid regretting what the future would be!

This is how consumers’ favorite new product in 2011, within the framework of the Ipsos LSA Innovation Trophies, came to be the “Parole d’éleveurs” egg range by “L’oeuf de nos villages,” with packs showing the producer located within a radius of 100 km, associated with promises of a carbon assessment along with maintaining family farms. Here consumers find the balance they are looking for, between pleasure, practicality and conscience.

For the first time, it is not the product creating the innovation but the way it arrives in the shopping cart, satisfying consumers’ need for a “good conscience.” That is why milk from local and regional producers was also well-placed in the awards list.

The consumer is aware of his economic value and is now very good at decoding marketing. He vindicates his free choice loud and clear and is freeing himself from brand discourse, choosing what he consumes and how he will do it in good conscience. The complexity of consumer choices will increase, even in relation to the price. So there will be a need to adapt, and the turning points for brands will be real.

Innovation, still the absolute response?

In a context like this, the risk for brands is as great as the opportunity they will have to transform themselves and come closer to consumers. 2012, good sense at the Heart of the discourse. At a time when brand names in banking, the car industry, and media publications are disappearing, brands have a reason to feel threatened...

However, it is within this context of radical change that opportunities to “revisit” are the greatest, brands will need to listen and anticipate the new way in which consumers operate, sometimes taking risks and doubtless trusting their intuition to innovate even better.

The brand’s only basic value, habitual attachment, is no longer enough to ensure consumer loyalty. Consumers are sensitive to brands that will speak to their conscience using their own (simple) words, and clearly show how they are helping them in their everyday life, building a strong emotional attachment, developing more authentic product experiences, without ever forgetting their pleasure.

Innovating will mean the ability to be rooted in everyday life, either in a practical way, or in a futile way, but always feeding the consumer’s conscience (I make it myself, at home, I save time, I do myself good, I [really] treat myself); finding the right choice between all these notions/functions will be the key to the future success of brands. In all cases, the

product experience will need to be strong, whether it is centered on pleasure or on comfort.

Innovating in 2012 will mean being even more pertinent in what is proposed to the consumer, so pertinent that it is the individual who will need to be addressed, being different in order to emerge and being “better” in order to survive. Thanks to the dazzling circulation of information linked to the new technologies, consumer segments will self-generate to arrive at massive adoption by individuals who have become collectively aware of “consuming well.”

Are we talking about consumer strength and collective conscience?

Very definitely. What should the marketing department’s response be? To feed into this conscience by adopting the most relevant channels and going even further in the educational accompaniment of the consumer who, in his consumption, will want to make deliberate choices in favor of a consumption corresponding (on his level) to the collective struggle against a crisis. So as not to regret what might be the world of the day after!

Missed appointments

In 2007, the Presidential election was viewed as an opportunity to achieve results thanks to the clear divide between what candidates were proposing, and to cancel/replace the 2002 confrontation between Jean-Marie Le Pen – Jacques Chirac.

Which explains the interest in the campaign, the participation rate in the second round (85.3%) and the impression that, in the future, everything would become possible or that a desire for the future was opening up prospects for a bright tomorrow.

The 2006/2007 sequence enabled the three scenarios for getting out of the results crisis to be expressed and be embodied in a champion: Ségolène Royal, Nicolas Sarkozy, François Bayrou.

Each one had a dimension, a scope and a collective ambition, **wanting the opposite, restoration, co-intelligence**.

If none of these scenarios worked, the fourth engaged in a resolute and complex-free form of narcissism, the **all-for-ego**.

Co-intelligence, carried by François Bayrou, was the first to disappear from the political field as a solution for achieving a result.

It spread like an inevitability in marketing or intellectual production with co-creation, and on many Internet sites that operate on this same principle of collaboration and free exchange, with *Wikipedia* being one of the pioneers through the creation of an online encyclopedia⁴⁴.

Co-creation is no longer a surprise to anyone and associating consumers, designers, researchers, advertisers, etc. in a process of innovation has, in a short space of time, become one research approach among many.

On the other hand, returning to the notion of national unity within a dangerous context for France could restore some shine to François Bayrou, enabling him to embody any expression of **“neither Sarkozy, nor Hollande”** and respond to disappointment in public opinion.

Wanting the opposite, embodied by Ségolène Royal, was founded on the idea that the solution, success or progress would be provided by the opposite of what had been done until now.

⁴⁴ At the time, the idea of content produced and completed by expert webservers (or who considered themselves as such) represented a cultural revolution.

Her “**taboo-free**” declarations, military supervision for delinquent minors, criticism of the 35-hour week, participatory meetings to generate ideas “**because the French are the experts on their own lives**”, the “**Cahiers de l’espérance**” (*Notebooks of Hope*) to collect their ideas, etc., were all initiatives born of the principle that their credibility resulted from their difference.

Around the same time, *Dove* was presenting women who were plump, wrinkled or older at the service of self-esteem, counter to the advertising ideal of the top model.

Since then, participatory democracy has disappeared from the media. Alain Delon is immortal for *Dior*, Kate Moss, idolized by a maximum of brands, is the icon of the “**God save the Kate**” exhibition (Galerie de l’Instant, Paris).

The **opposite** is no longer a winning strategy for convincing people that the result is making a comeback. Or the result is normal, therefore, no reason for thanks; or there is no result, and that strategy has not proved itself either.

With no regrets, left-wing sympathizers thus broke away from Ségolène Royal during the Socialist party primaries, with a merciless send-off, less than 7% of the vote; far behind Arnaud Montebourg (17%), Martine Aubry (30%) and François Hollande (39%).

Restoration, with Nicolas Sarkozy as its harbinger, is supposed to re-establish the hierarchy and a return to order as the conditions for getting the machine back in motion. One of its shock formulas “**liquidating the heritage of 68**” was a whole program in itself. This is the opposite of wanting the opposite, since this approach asserts that there must be a return to the fundamentals that structured society and favored its expansion: authority, respect, rules, merit... are the key words in this method promising success and enrichment through effort and work.

While maintaining the idea of a strong State to fight social and economic insecurity, it intends to make individuals responsible while not disillusioning them about the Welfare State, in order to recreate a sense of personal and national pride.

The success of TV programs featuring coaches corresponded to this positioning; while the psychiatrist explains, the coach provides the instructions, with a duty to produce a result.

With no regrets, the French could also envisage taking leave of Nicolas Sarkozy too, after Ségolène Royal.

The presidential election barometer 2012⁵ of November 2nd clearly indicated that: ***“if the presidential election were to take place next Sunday,”*** one voter out of three would vote for François Hollande in the first round (35%, + 3 points compared to September), and 62% in the second round against Nicolas Sarkozy.

Until the moment when the effects of the European crisis threatened France, Nicolas Sarkozy experienced a long descent in public opinion.

From 2008 to late 2011, the disappointment was amplified, with a regular drop in confidence, popularity, and approval of the politics and person of Nicolas Sarkozy.

The most widely shared feeling was the gap between his 2007 program and the reality five years later.

For those in favor of it, the reality principle explains why Nicolas Sarkozy couldn't do otherwise: thanks to his action, France ultimately came out of the world financial crisis better than the other European countries, with the crisis as the main cause of the reorientations and measures that he was obliged to decide on, explain, assume responsibility for.

He is even less responsible for the situation for the fact that guilty parties do exist, many of them, old or intrusive: the Greeks themselves, who falsified their accounts and lied to get into the euro zone, the ones who let their debt get out of control, the rating agencies...

For the others, the crisis is an alibi to justify negligence and incompetence culminating in the patchwork of decisions that were supposed to answer the debt crisis that caused the problems with the euro zone and the financial markets during the summer of 2011, or the drop in growth forecasts for 2011 and 2012 (brought down to 1%).

In mid-November, 36% of French people thought that the President of the Republic would be ***“re-elected if he ran in the next presidential election,”***⁶ whereas his favorable opinion score went up seven points compared to June with 37%, a considerable increase in all indicators.

⁵ Ipsos / Logica Business Consulting poll for Le Monde, Cevipof, Fondapol and Fondation Jean Jaurès. 6,000 people registered on the electoral lists constituting a representative sample of the French population aged 18 years and over. These people have agreed to be re-questioned at regular intervals until the second round of the presidential election in May 2012.

⁶ Ipsos-Le Point, Barometer conducted on November 10th and 12th, 2011 among 958 people constituting a nationally representative sample of the French population aged 18 years and over, by phone based on the quota method.

The last political action barometer⁷ from December 12th, and the Electoral Panel “*France 2012*”⁸,” established the conditions for his re-election or for a new scenario of disappointment, given that three major commitments made by Nicolas Sarkozy in 2007 had been memorized: the re-establishment of security, an increase in purchasing power and, on a more psychological level, a re-energized, confident country, inspiring a desire to be entrepreneurial.

Since then, we have also seen:

- With his speech in Grenoble and various criminal scandals, the return of the security theme,
- With the “debt crisis,” the desire to protect France and prevent measures equivalent to those taken in Greece, Italy, Ireland, etc.
- His TV appearances.

Initially, Nicolas Sarkozy positioned himself as an educator, trying to explain the economic situation, the problems faced by Europe, the responsibilities with regard to debt, etc. to the French people.

This injected new energy into his supporters and gave the impression that the President of the Republic had changed style and was in control of things, in partnership with Angela Merkel, in a balanced relationship.

And yet, every week that goes by creates the feeling that the situation is worsening, that it is more complicated, that it has escaped all control, with Angela Merkel dominating the “French-German couple.”

The time that has gone by since the post-vacation period of 2007, Nicolas Sarkozy’s commitments, the repetition of the same phenomena stretching out over months, have all culminated in the idea that he is struggling to provide lasting results.

Which has led to an effect of leadership being replaced by a show of action, which is spreading to other subjects: security, unemployment, broadening the split between supporters of Sarkozy and his opponents.

2012 is therefore a time for making choices between two perceptions of time: either

⁷ Ipsos-Le Point, Barometer conducted on December 9th and 10th, 2011 among 970 people constituting a nationally representative sample of the French population aged 18 years and over by phone based on the quota method.

⁸ Ipsos / Logica Business Consulting poll for Le Monde, Cevipof, Fondapol and the Fondation Jean Jaurès. 6,000 people registered on electoral lists constituting a representative sample of the French population aged 18 years and over. These people have agreed to be questioned again at regular intervals until the second round of the presidential election in May 2012.

make a “**break**” from a policy that has failed, or give the pilot time to “**finish the job**”; in both cases, without regretting his choice.

[**Outgoing, going out**]

Brian Cowen in Ireland, José Luis Zapatero in Spain, Georges Papandreou in Greece, Silvio Berlusconi in Italy: all these personalities from political life, who have been a driving force in the news in their own country and in Europe for years, resigned from their post in the space of a few weeks. The crowds dancing and singing, toasting in the street, did not give the appearance of a population weighted down with sadness and regrets.

In Greece and Italy, the two prime ministers gave in to pressure from the markets, demanding their heads before they would accept extra loans, with the Greek debt representing 163% of GDP, Italy’s 120%. They have been replaced by bankers: Mario Monti, former European commissioner for competition and advisor to the Goldman Sachs group, Lucas Papademos, former Vice-President of the Central European Bank.

In Spain, despite an election, there would be no move away from austerity: Mariano Rajoy, after the victory of the Popular Party in the legislative elections, had no other choice than to take radical measures following the ones instigated in 2010; 5% drop in the salary of government agents, a freeze on pensions, pushing the retirement age back from 65 to 67 years.

Note that the departure or withdrawal of these leaders was not linked to “**normal**” electoral campaigns, but rather to their inability to reach the financial objectives designed to re-establish the confidence of the markets, limit the cost of debt, and re-establish growth.

This leads to basic questions about the exercise and democratic conditions of these alternatives, and – directly, in France – the influence of economic and international events on the vote: amplifiers of Nicolas Sarkozy’s failure? Or on the contrary, creators of new expectations as part of the exercise of power: a man capable of withstanding the markets and resisting pressure?

In the first case, the duel is easy for François Hollande as leader of the opposition, in the second, a particular stature and strength must be shown, compatible with the new international situation.

For the first time, the French will have chosen on the basis of international criteria: protecting themselves (Nicolas Sarkozy), withdrawing (Marine Le Pen), or adapting (François Hollande).

INTERVIEW Brice Teinturier, Ipsos France

Apparently, 2012 is the election that the Left can't lose, for at least 8 reasons of unequal importance.

It is not the outgoing party, and for the first time since Valéry Giscard d'Estaing, the Right is, without any dilution of responsibilities through the cohabitation game.

It has won all the intermediate elections since the 2008 municipals and, for the first time under the 5th Republic, is in control of the Senate, expressing a dynamic trend as well as the gradual establishment of the idea of alternation.

It is fielding a number of candidates which, if not limited, is at least within the average of what it has done since 1974: 6 maximum, counting Philippe Poutou and Jean-Pierre Chevènement, who will not or may not be able to keep going to the end, bringing this number down to 4 or 5.

Its candidate was designated using a new procedure, the open primaries, which were fairly successful and without the breakups of 2007 there to split them.

Above all, the left-wing bloc is well placed: between 45% and 47% of the intended vote for the 1st round. That's around 10 points more than in 2007, 4 more than in 2002 and 6 more than in 1995. And it's a level close to that of 1981. In reality, not since 1988 and in a very particular context has the Left, pulled by an outgoing President at a very high level (34.11%) done slightly better.

And within the various Lefts, the Socialist Party is largely dominant: polls are placing François Hollande at between 30 and 32% of the intended vote, in other words around 65% overall. That positions him at a fairly high average since in 1981, François Mitterrand accounted for 55% of votes for the Left (69% in 1988). In 1995 and 2002, the share of Lionel Jospin's vote was lower than 60%: 57% in 1995, 37% in 2002. 2007 represented a deceptive exception since Ségolène Royal admittedly produced 70% of left-wing votes but within the context of a Left at a low point (36.5% of vote), after registering a tactical vote in the first round to avoid repeating the "trauma of April 21st", but largely siphoned off by candidate Bayrou.

As regards controversies, economic and social issues seem more than ever to be at the heart of the 2012 campaign and constitute priority expectations for the French people. Yet whether it's employment, purchasing power, the future of pensions, the future of the health system, national education or inequality, candidate Hollande very largely dominates the outgoing President and is also doing a little better in relation to deficit reduction.

Lastly, and more than ever, the National Front represents a heavy handicap for the Right: first because of its level, between 16% and 19% according to polls; then through the second-round vote transfer matrices for Marine Le Pen's voters, which are currently at a historically low level for Nicolas Sarkozy (less than 40%).

The power struggles, the levels and the controversies thus lean in favor of the "Lefts" in general and the Socialist Party in particular. And yet, it would be risky to state that things are played out in advance because the Left is also so fraught with weaknesses. At least four can be discerned.

First of all, the Left lacks unity. Admittedly, like the Right, it has had multiple facets for a long time. But where Nicolas Sarkozy is in the process of reconstructing an ideological unity based around a few fundamental values (austerity, work etc.), meaning greater coherence, deep disagreements oppose the Left of Jean-Luc Mélenchon, the Left of Eva Joly and the Left of François Hollande. The nuclear issue revealed an initial stumbling block, but pensions could be another, as could the relationship with Europe. As is often the case, it is the rejection of the opponent, and so in this case of Nicolas Sarkozy, that is providing a kind of cement, but that can nevertheless crumble.

The Socialist party lacks a leadership culture: with the exception of Dominique de Villepin, the minor and major tenors of the majority are behind Nicolas Sarkozy. Some of them of course have ulterior motives, but they are still there and are pushing together. Many socialist personalities seem to be absent from the cast list or are not very active. François Hollande does not dominate his teams the way Nicolas Sarkozy imposes a unity of tone within a vertical structure which is disliked by public opinion, but which is still effective in this respect.

The economic crisis is an asset as much as a wound for the Socialist Party and its leader. An asset because it dominates reviews of the President's performance and imposes an austerity cure that is rejected by a majority of French people, but a wound also because it makes it more difficult to express a policy that is both alternative and financially credible. Moreover, the crisis brings relief to a President "alongside other heads of State." Of course he still needs to produce a result to fulfill this image of a President who is even "higher and further," but this dominant position can also underline François Hollande's weakness in this respect.

Finally, the working class categories currently reject Nicolas Sarkozy and are focusing their votes on Marine Le Pen and François Hollande. But they are also potential abstainers. While their mobilization is differential and leaning imperfectly towards François Hollande, and while vote transfers among Le Pen supporters between the two rounds are improving for Nicolas Sarkozy, things can still change.

In late 2011, the Left and the Socialist Party seemed to be on track to win in 2012. But at this stage nothing is definitively played out. Admittedly, the desire to punish the

outgoing president “with no regrets” is there, but the Left needs to add a positive dynamic current in order to really be in the game, and avoid its own potential weaknesses.

[Living for self]

On an individual level, the **All-for-ego**, re-qualified as **“egonism”** in Ipsos Flair 2011, comes out the winner.

As in a molecular structure, each atom is in its place in its solid, definitive, unavoidable aggregate.

It consists in a distancing from politicians, greater expectations of brands, companies and media, ultra-rapid decoding of advertising intentions and messages in general, systematic comparison to find the best price, weariness with norms, fear of the future, concern for oneself most of all.

These sparse elements have now been solidly assembled to form the grid that filters the relationship between all message broadcasters and their recipients, whatever the field, marketing, human resources, customer satisfaction, communications.

From 2009 to 2011, its rise was spectacular, its credo was endorsed by most advertisers who had been gobbling it up ever since the pioneer, L’Oréal, introduced **“because you’re worth it.”**

Egonism is the end result of defiance, that key to understanding French society, as if each person was now laying claim to their own stance: a desire not to be fooled so as to win back their freedom.

Shamelessly asserting a total lack of confidence is even a typically French attitude: in response to the statement **“in life, you can trust most people,”** 55% of Americans, 46% of Britons and Italians answered “yes.” In France, 19%.

After 2002 and the Chirac / Le Pen duel, after 2005, the European Constitution project and the No vote in the referendum, the criticisms of the euro in terms of purchasing power, the divide between public opinion and the Authorities accelerated and deepened.

In less than three years, the customer/consumer has moved to the center of all the attention: **“It’s just because it’s you,” “Come as you are,” “What can we do for you today?” “Absolutely you,” “Well done me. I’m my own banker,” “Do more for you.”**⁹

A combination of egoism and hedonism, “egonism” has set in like a quest for exception and a vindicated form of carpe diem.

⁹ Casino, McDonald, Monoprix, SFR, B4B, Bouygues Telecom

The consequence: a disinterest in public issues and general ideas, a focus on the private sphere as a subject in which each individual intends to be a player and to please himself.

One telling sign of this, the IKEA slogan has evolved from order to pleasure, adopting the rationale of society as a whole: after *“Store”* in 2007, it’s *“NJUT, Enjoy”* in 2012, a whole program that is... egomaniac? We’ll come back to that.

[Refuse to regret]

On a collective level, the question increasingly arises as to what we should exclude from having to regret.

For some people, having to regret would also mean giving up. But what?

- Republican values
- Social benefits
- The health system
- The contributory pension scheme
- Solidarity
- Public service
- Equal chances
- The minimum wage
- Retirement at 60 years
- The industrial potential of France (mines, iron and steel, ports...)
- National sovereignty
- Energy independence with nuclear energy
- France’s independence as part of the Lisbon Treaty
- Military authority as part of NATO.

The common solution proposed by the Front de Gauche, Front National, Mouvement Républicain et Citoyen and Nouvelle France: Deglobalization.

Walden Bello, a Philippine sociologist and writer, explains this notion in *“Deglobalization, ideas for a New World Economy”* (2002) which goes much further than alterglobalization.

Alterglobalists do not call free trade into question but mainly call for “fair” political supervision of economic globalization, to counter the perverse effect brought about: the risk that inequalities between countries of the North (USA and Europe) and countries of the South (Sub-Saharan Africa and LDC) will become definitive, notably to reduce costs, and that the world should become structured into (rich) consumption zones or (poor)

production zones.

For Walden Bello, the neoliberal operation of globalization penalizes the economies of countries who base their development on exports alone and are not sufficiently concerned about the conditions for the emergence of a real middle class able to take over: the countries of the South¹⁰.

On a global level, his plan is to limit the interdependence of economies, already called into question by Keynes.

On a local level, its political application is a reinforcement of the powers of the State, with a much stricter system of control, such as direct deduction of taxes from the profits of multinationals, standardizing speculative flow, banning international groups from placing their capital gains in tax havens, creating customs barriers with taxes on products imported from China or Asia, developing self-financing and getting out of Agency rating systems¹¹.

During the Socialist Party primaries, Arnaud Montebourg made this his warhorse, following the rationale laid down in his book **“Votez Pour la Démondialisation”** (Flammarion) a major factor of which is placing the banking system under supervision.

As for the Front National, it wants to rethink and legislate on the freedom of movement of individuals (in the name of immigration control), merchandise and capital (in the name of monitoring trade and financial transactions).

As of now, 74% of French people claim to be favorable to setting up a protectionist policy at the European borders (33% of them “Absolutely favorable”); the euro is viewed less and less as an asset (28% in August 2010, 26% in September and 21% in October 2011) and more as a handicap (34%, 40%, 41% during the same period, and 48% in November). In less than two months, the proportion of those who don’t want France to stay in the Euro Zone went from 26 to 36%...

The French would thus abandon the euro **“with no regrets,”** especially when you consider that since the outset, two thirds have always thought that the euro was the cause of the drop in their purchasing power.

This is particularly the case for blue collar (65%) and white collar (53%) workers, who are

¹⁰ China (cf. *“Ipsos Flair China 2012, the dragon takes off”*) is the counter-example of this, since it wants to base its growth on both simultaneously.

¹¹ In late October, in criticism of the AAA rating by Agencies, Jean-Luc Mélenchon dropped off a basket of andouillette sausages by the AAAAAA (abbreviation of Association amicale des amateurs d’andouillette authentique) at the Moody’s office in Paris.

most favorable to a return to the franc, while executives (82%) and intermediate occupations (69%) are still attached to the euro¹².

With the anxiety generated by the Euro Zone crisis, egocentrism has spread to the whole territory as if France, more than ever, was supposed to identify with its weather map, a map where it has no borders : UK, Belgium, Luxembourg, Germany, Switzerland, Italy, Spain have disappeared.

European integration is a dream concept for fewer and fewer French people; with 19% of voting intentions during the first round¹³ in October (+3 points since September 2011), the President of the National Front would profit most from this situation, uniting the right's Euroskeptic strategic vote.

Like a hatchet or cutter, France has carved out a shape for itself free of any neighbors, to manage without them, the French among themselves.

We will only talk about neighbors in the case of extreme weather, a volcanic eruption, earthquake or bankruptcy.

It is true that certain neighbors may be annoying, like the Greek Prime Minister Papandreou requesting a popular referendum on October 31st for the implementation of the rescue plan adopted four days beforehand by the seventeen European leaders, a project validated unanimously by the cabinet in an extraordinary session.

The cause according to him was the threat of a military takeover in Greece, with the call for a referendum following the dismissal of the Chiefs of Staff of the Army, Navy and Air Force, along with a dozen superior officers, replaced by military officials close to the Pasok, the Greek socialist party.

A few days later, Georges Papandreou abandoned the referendum, which had triggered a psychodrama and an exceptional storm on the stock markets, and resigned from power.

The “**Arab springs**” are another example of gradual weariness with all things international: the audience for these topics on the TV news was reversely proportionate to their frequency.

¹² Ipsos for the association Lire la société, presented on Wednesday December 7th on the occasion of the 2012 economy book prize awards.

¹³ Ipsos/Logica Business Consulting conducted for France Télévisions, Radio France and Le Monde.

National communitization operates on the same principle as ethnic or religious communitization, living among one's own, on various scales and geometries that can vary: Frenchtown, Chinatown, Muslimtown, etc.

Protectionism or new alliances?

In his October 27th interview (watched by 11.9 million TV viewers), the President of the Republic recommended *“the Franco-German convergence”* with the two countries becoming *“at the heart of Europe, the heavyweight of the economy.”*

Consequences:

- The alignment of French growth forecasts for 2012 to 1% like Germany,
- The rapprochement of VAT rates¹⁴ and tax systems.
- A corporate tax with the same base (implying an increase for large corporations).

This objective – part of *“the rationale of the single currency, economic integration and convergence”* – implies giving up sovereignty, the exact opposite of protectionism, within a context in which the image of Europe is less reassuring.

¹⁴ Given that the reduced rate is higher in Germany than in France (7% as opposed to 5,5%).

INTERVIEW Etienne Mercier, Ipsos Public Affairs

Are the French experiencing an environmental crisis of faith?

For a little more than a year, we have been witnessing a conjunction of phenomena that suggest that when it comes to the struggle to protect the environment, consumer opinions and even behaviors are evolving. A crisis of faith is spreading. The French are showing themselves to be less concerned about the future of the planet (–8 points since 2006), while the level of skepticism about the seriousness of environmental threats is progressing (+6 points): 43% now even consider that they are exaggerated. This crisis of faith is nourished on the one hand by a real defiance with regard to the discourse put out by the authorities. Thus, only a minority of French people currently trust scientists to tell the truth about the results and consequences of their work in the field of climate change (48%). This phenomenon of doubt and questioning of the experts' positions is general, and it doesn't only concern climate issues. For the environment, it can also be partly explained by climate-gate, the controversy generated by Claude Allègre as to the reality of climate change and the failures of the summits in Copenhagen and even Durban. But not just that. The lack of direct experience of environmental degradation is also feeding into doubts and generating questions: "Do they really exist?", "How do they concern me directly?", "Aren't they exaggerated?" Most French people consider that where they live, the environment is of good quality (the figure hasn't evolved since 2006), while the level of inconvenience or problems linked to atmospheric pollution has dropped by 9 points (28%, its lowest level). For public opinion, if the quality of the environment is worsening, it's on a global but definitely not on a local scale. Of course, the economic crisis is also one of the main catalysts of the relative drop in interest among French people in environmental issues and sustainable consumption. Nowadays, purchasing power is the main personal concern among French people (mentioned by 55% of them), far ahead of the environment (only 9%). With the economic crisis, they are logically giving priority to immediate stakes to the detriment of those perceived as more distant, such as the environment. As a result, the impact on public opinion of an international conference on climate change with deadlines 20 or 50 years from now currently has no possible comparison with the impact of the almost weekly European summits whose stated goal is to save the Euro Zone before Christmas. Even within a context of environmental disaster, the French increasingly want to prioritize immediate economic interest to the detriment of the protection of the environment.

And Fukushima?

A few weeks after the disaster, the priority factors in the eyes of the French for defining France's future energy policy were changing, but not in the way we might have thought. Respect for the environment certainly comes out in first position, but continues to be significantly eroded, poll after poll (–6 points since 2010, –20 points since 2006), while the price of the kilowatt-hour is progressing (+10 points since 2006), as is food safety (+5

points). Announcements of increases in the price of gas and electricity today have a greater and more direct impact than an accident, or even a nuclear disaster taking place thousands of kilometers away. The crisis of faith and the economic crisis are also helping to trigger a consumer confidence crisis. The level of defiance in relation to information on the most environment-friendly products has reached its highest level since 1997 (only 31% view it as scientifically based, -13 points), with the French stating more and more that they will not use environmental labeling when they do their shopping (46%, +8 points). For a product or a service, the mere promise of being more environment-friendly than the others is not enough and many consumers have no remorse in admitting that it no longer convinces them.

Increasingly pragmatic, they now expect directly measurable benefits from the products presented to them as more environmental than the others (gains in terms of their health, their purchasing power or even for sustainable development). Everything they give up should come with a benefit. The “without” must come with a “plus.” Every product in which an ingredient is removed for “responsible” reasons must offer an undeniable benefit. Within this context, all communications surrounding sustainable development will need to be revolutionized. Because there are gaps in the information being provided to French people and many of them have trouble understanding it: only a minority have a precise idea of what sustainable development is (46%), or energy performance (36%) or a product’s carbon footprint (32%). What can they understand when a manufacturer claims that a car only emits 120 g of CO₂ ? How does that concern them directly?

By learning what lasting benefits can be drawn from a product or service, each person must have the means to ensure their responsibility, without having to assimilate information that is too complex. Some players already seem to have become aware of this trend in opinion. Hence, when the “Magasin U” stores stated, in their latest campaigns, that they prioritize local products to encourage sustainable development, it wasn’t to assist with the reduction of carbon emissions due to transport, but to give priority to local employment and fight unemployment, while lowering the cost of products since transport costs are cheaper. More than the planet, it’s the ego and the economic that the French now want to prioritize through sustainable development.

[Regret, but why?]

Regret-free generations

The up-and-coming generations have no subjects of regret, simply because they were born after the mythologized sequences of the Thirty Glorious Years or the dramatized sequences of the Thirty Pitiful Years of French history.

“Generation C” (Communicate, Collaborate, Create) is the new name designating men and women born between 1984 and 1996, for whom smartphones and the Internet are familiar tools.

Michel Serres names it *“generation Thumbelina, for their ability to text with their thumbs. This is the school and university student of the present day, and they are living through a tsunami, the world is changing so much around them. We are currently experiencing a period of immense disruption, comparable to the late Roman Empire or the Renaissance.”*

What were people nostalgic about during the Renaissance? In theory nothing, since their plan was to get rid of all the archaisms and superstitions in favor of creativity and pure reason.

Why would Generation C be nostalgic today? What do they have to regret?

They are not fooled by the idealizing way that the Baby Boomer or X Generations played their own lives over...

With the exception of those born into affluent circles and who inherited an economic and cultural heritage, this generation has nothing to regret except their parents harping on about what they would have liked to have and pass on.

For them nostalgia is a purely aesthetic affair: the same object, symbolic of blessed days revised and corrected for the Baby-boomers, the Bobos or Generation X (people born in Europe between 1959 and 1981) will be *“stylish”*¹⁵ or not, the only criterion for electing or excluding it.

A few examples, black and white and silent¹⁶ films are viewed as a must in conveying

¹⁵ Record player, vinyl discs, dial telephone, Formica, etc., are some of the status codes of future Bobos.

¹⁶ Jean Dujardin received the best male actor prize in Cannes for his role in *“The Artist”* by Michel Hazanavicius, where he plays a star of the silent movies, with thin moustache and smoking jacket, the d’Harcourt attitude.

beauty, universality and emotions, due to the unique quality of the grain, of the light and of the acting, with actors no longer able to count on their voice to express themselves.

The **“iTypewriter”** combines a Remington and an iPad; the keyboard with metal keys and the design of the former combined with the screen of the latter for greater user-friendliness. The **“iArcade”** turns your iPad into an arcade station with vintage Atari games, such as Asteroids, Centipede or Battlezone.

Generation C will have even less to regret since they already made their own this statement from former Saudi Minister for Oil, Ahmed Zaki Yamani: **“The Stone Age didn’t end for lack of stone, but because men launched themselves into the adventure of progress and research.”**

Sexual freedom

While sexual freedom was one of the struggles of the Thirty Glorious Years, abstinence is a hot media topic.

“No Sex Last Year, La Vie Sans Sexe¹⁷” by David Fontaine, **“L’envie¹⁸”** by Sophie Fontanel, and the Asexuel.org website¹⁹ have in common a sort of apology for the absence of sexual relations²⁰.

The survey on sexuality in France (Ined, 2008) lists 10.8% of women and 6.6% of men claiming to have had no sexual relations for at least one year, including 2% married couples.

Pascal Bruckner in **“Le Paradoxe amoureux²¹”** considers that **“sex has become, like salary or physical appearance, an exterior sign of wealth that individuals add to their social panoply.”**

¹⁷ *Les petits matins &Arte éditions*, “Bruits” [Noises] collection.

¹⁸ Robert Laffont.

¹⁹ Adaptation for France of the US site AVEN (Asexual visibility and education network): network for the education and promotion of asexuality.

²⁰ http://www.lepoint.fr/societe/sexualite-l-empiredes-sans-01-11-2011-1391312_23.php

²¹ Grasset.

Because she lays claim to the right to no longer *“botch her desire”* or *“refuse mediocrity,”* Sophie Fontanel says she experiences this deprivation as a liberation: *“I suddenly felt as though I had delivered myself of a weight, becoming more available. When absorbing intimacy stopped, I experienced a feeling of openness.”*

Will abstinence become another way to assert your difference?

INTERVIEW Laila Idtaleb, Ipsos Santé

Health, yet another stressor for the French in 2011?

In the health domain, 2011 was marked by the famous Mediator affair.

A gripping, troubling, disruptive year due to the seriousness of the accusations made against the Servier laboratory, the dysfunctions presumed to be the root cause of this crisis, the changes that the Mediator crisis foreshadowed for the health system...

And yet, 2011 was essentially a fine illustration of homeostasis. Many commentators and players in the health world had imagined that everything would change after this profound crisis. And things did change after the trauma: the climate first, making drug companies, health authorities and even prescribers more vigilant, more concerned about their image and the confidence they enjoyed. But the winds of change did not blow within the pre-electoral context and will probably not blow in 2012: no decision announced beyond the compensation of the victims, legal consequences (suspended for the time being), and a project for a law governing conflicts of interest and making medical visits at the hospital obligatory.

Finally, and this is what will interest us here, the situation hasn't changed much in terms of confidence in public opinion. The French, who were (re)discovering the notion of risk and uncertainty inherent in drugs, almost at the same time as a serious nuclear accident was occurring in Japan, another experience of technological risk, would nevertheless fail to call into question the fallibility of pharmaceutical technology: they continue, despite the insinuated doubts about the sincerity of information and ethics through the example of the Mediator, to express their confidence in "their" drugs. Most patients will above all, leave it even more to the doctors now.

Decrypting?

The scandal was a serious one: several hundred or thousand deaths due to the cardiac side effects of an anti-diabetic drug. Prescribed wrongly or rightly, public opinion would not blame doctors for the consequences of the Mediator, or at least very little. Others would be the subject of the people's condemnation. On the accused bench: Servier and the AFSSAPS, the French health safety agency. The media reveled in the perfect bad guy: with President Jacques Servier adopting the traits of an evil genius in the media, cynical, manipulative, unscrupulous...

This was one of the distinctive points of the crisis: this personification helped prevent the entire industry from being accused of dissimulation, deception causing death. However, the image of the laboratories obviously suffered from the scandal, with criticisms mainly focused on the commercial drifts of sales teams who, already weakened by a series of

downsizings since 2002, risked being the main collateral victims of the Mediator.

The other bad guys were the health authorities, sometimes judged as apathetic, sometimes denounced for their connivance and complicity. The problem was a general one due to the dysfunctions operating within the health authorities, as Minister of Health Xavier Bertrand has publically stated.

Prepared for defiance by a series of other health crises, the French are in strong support of this vision of the crisis and most seem willing to throw the AFSSAPS out with the Mediator bath water, “with no regrets”... And yet they are not buying the logical consequence of the official reasoning: if the problems are general, and mainly linked to the failures of the health authorities, then there are surely other Mediators out there. There are no regrets about throwing out Mediator, but we don’t want to sacrifice everything. Let’s not forget that the French hold many world and/or European records when it comes to drug consumption. The rupture that a profound questioning of drugs would force would have too brutal an impact on current habits to be conceivable. So a large majority of French people continue to express confidence in drugs (82% claimed to trust them in May 2011). Behind these appearances of confidence, doubt has nevertheless set in, and the level of uncertainty has increased.

Enter the doctor, as a historical figure, a reassuring pillar. He is the one in whom confidence is placed, against all expectations, and more than ever. The French are reassured that the drug, a technology that both heals and threatens, is embodied in a human. Within a potentially dangerous environment that is complex to control, we need to delegate the management of uncertainty to a third party. Doctors aren’t always aware of the confidence capital they enjoy, nor of the reaffirmation of their position following the Mediator scandal. Many of them, afraid for their image, have distanced themselves from the industry and/or brands.

Therefore, never mind the public’s conservatism, the lack of dynamic public policy, the post-Mediator period offers its own set of challenges for industrialists and health authorities seeking credibility: they will need to work closely with prescribers to inject confidence into the system. Around demands for transparency, ethics, and with a sales force who are increasingly limited, weakened in terms of image, the laboratory-physician relationship will need to be reinvented.

Finally, let’s not lose sight of the patients. In the future, there will be a larger number of patients hardened to a diversification of trustworthy contacts aside from doctors (still a minority according to studies): the doctor’s voice will be enriched or challenged more often by patient testimonials: via forums, communities, whose potential should not be underestimated.

Price without morality

In the meantime, when it focuses on brands, non-desire is a problem.

Increasingly, consumers are claiming to be attentive to prices: *“I pay attention to prices when I’m shopping for food”* has progressed; 68% in 2006, 73% in 2008 and 76% two years later.

But don’t make the mistake of associating this change exclusively with the issue of purchasing power: 2006 was neither the year of *Lehmann Brothers* nor the debt crisis.

Paying attention to price links to the question of its legitimacy according to products and sectors, based on criteria of usage, rationalization, or even demand for moralization.

“Food products should not be expensive” is progressing slowly in qualitative studies because they have an obvious vital function.

Just as a prepared dish or microwaveable recipe provide services (practical, fast, enjoyable taste, diversity) justifying a higher price, it is difficult to understand why one should pay 3, 4 or even 5 euros a kilo for an everyday vegetable, fruit, etc. with no obvious added-value.

After a phase in which consumers were willing to overpay for a promise (organic, authenticity, regional, guaranteed origin), now they are returning to the product’s intrinsic usefulness and actual performance, leading to an increasingly subtle hierarchy of prices, and growing vigilance with regard to products with no promise.

INTERVIEW Thomas Tougard, Ipsos France

The conclusions of the 2011 Flair were clear and unambiguous: confronted with the fears expressed by the French people, several refuge strategies were being envisaged: the local approach, restoring magic and coaching. Another striking fact, taking refuge in aspirations of the past had marked the end of the decade, giving new life to a taste for vintage things.

More than an epiphenomenon, and as the months went by, this trend became international. It reached a peak recently on observing the “street style” in the big capitals. In New York, the very latest fashion boutiques are not only adopting the codes of the 50s or 60s, but are attempting to reach back as far as the 30s and 40s. The sales staff are straight out of a John Steinbeck novel in their get-ups. Clothing codes, which are a showroom of consumer trends, are now so expressive that they can border on caricature.

One year later, we can't claim that the situation has improved. The French are still the world champions of pessimism when it comes to viewing the economic future of their country (Ipsos “Global Advisor” - November 2011). However, they are more optimistic when it comes to their own future, thanks to the development of adaptation strategies, and what is commonly referred to as a smart attitude: we have all in some sense become “smart shoppers,” “smart cooks,” “smart housewives,” and tomorrow, why not “smart drivers” or “smart citizens.”

How does the balance sheet look in early 2012?

The future is scary, yes, and the balance sheet is a merciless one. Restoring magic through consumption or aspirations of the past all constitute palliatives, because they provide compensation and reassurance. But they only bring partial responses to consumer-citizens looking for a better quality of life.

Faced with this situation, emerging attitudes are focused around resilience, hyper-realism, pragmatism, and adaptability. Previous versions of Ipsos Flair identified the emergence of a guilt-free disloyalty to brands. This has become widespread, but also reasoned, considered, organized, consisting in compromises, choices and therefore giving things up too. Which sometimes leaves us with a perplexed view of the purchasing power of the French, in the face of a premiumization of the product offer, which increasingly co-exists with the development of low-cost.

Who would have bet that right in the middle of an economic crisis, sales of the latest iPhone would be booming, whereas 85% of French people were claiming that their purchasing power was decreasing (source Ipsos November 2011).

At the same time, with consumers' disaffection for national mineral water brands, associated with a historic drop in sales of bottled water in France, the French started buying these brands they had disowned. The brands had managed to meet their need for affordability, simply through providing more regular promotions. The French don't regret their actions when it comes to consumption.

The future is scary. The past reassures, but it only brings a cosmetic, ephemeral form of pleasure. Long live the present!

"In life, at the beginning you're born, at the end you die. Between the two, things happen, Bref is the story of a guy between the two..." This is the leitmotiv for the series "Bref" on channel Canal +, which is attracting record audiences (almost 2 million fans on Facebook) because it speaks to those who like to idealize simple, human everyday life, disconnected from fears of the future and false aspirations for the past.

It's here and now, and there are no regrets.

[The answers to be provided]

Having no regrets also means being free of illusions as to the usefulness of the institutions and stakeholders in the consumer society, and expecting transparent and genuinely new approaches to the subjects of interest to the public:

- The usefulness of the traditional mechanisms
- The real role of the “crisis”
- The reasons for re-electing Nicolas Sarkozy or giving another candidate the keys to the Elysée.

The usefulness of traditional mechanisms

The French are not the only ones to mix fatigue and detachment, distancing and a desire for mockery: in Belgium, “**the Golden French Fry**” is the ironic award given to a country that existed without a government while counting²² the days it went without one: 540 days in fact by December 6th 2011, when King Albert II finally appointed the socialist Elio Di Rupo to the head of a team created from coalitions.

From the outset, Bart De Wever, leader of the Flemish independence party and winner of the elections in Flanders, refused to recognize Di Rupo, because he was not supported by a majority of Flemish parliamentary representatives.

In France, the various scandals relating to corruption, morals, and a variety of disreputable practices that left their mark on 2011 also created the conditions for changing the style of presidency.

The portrait of the “**Ideal President**” has changed: we expect an individual who is moral, honest, who puts the interests of his country before his own, whatever his convictions, with an exemplary sense of equity.

He must report back regularly and provide transparent information on the social and economic reality.

The tradition of belonging to an elite (social, intellectual, one of the prestigious administrative schools, etc.) is becoming a problem: ideally, the President should come from another background (in Italy for example, most politicians are University professors with an academic culture). Failing that, he must imperatively have gone beyond this status to defend a set of ethics, the interests of the popular classes, education.

²² www.rtbf.be/labs/2010/08/un-compteurspecial-gouvernementou-en-sommes-nous

The model of the omniscient President is disappearing, with no regrets. Here again, the dialectic between Authority/collective intelligence emerges as a fundamental expectation.

Contributory democracy is an issue of governance: the French have the increasing impression of being dispossessed of their sovereignty, whereas the social networks are nurturing the desire to express oneself, take part, influence the action of governments, and the action of brands, companies or the media.

This all goes via the boom in the popular referendum initiative, which enables citizens to propose one law or repeal another.

While its principle is in line with article 11 of the French Constitution, it is almost impossible to implement in France: it must obtain the support of one fifth of the members of Parliament and the signature of 10% of registered voters (around 4.5 million French people); if its outcome is negative, a period of two years must go by before the same question is asked again.

Obviously, it's much simpler elsewhere, as in Germany, the USA, Switzerland, Italy, Austria, where the monitoring and validation of the high-ranking constitutional bodies is sufficient.

The justification of the “Crisis” as sole cause of the situation

Do the French sense the existence of a real economic crisis in France, directly impacting their lifestyle, exhausting their purchasing power, obliging them to abandon and postpone purchases, vacations, personal plans to another day, to empty their savings, sell their possessions, and so on, in a context in which 20% of the population is unemployed²³?

According to claims, yes, there is no doubt about it, with 68% affirming that they ***“are currently suffering the effects of the economic crisis in their personal life and in the lives of those close to them”***²⁴. Likewise, the Ipsos study on purchasing power for LSA²⁵

²³ Unemployment rate in Spain: 21.5%, in Greece: 18.4%.

²⁴ ²⁴ Survey conducted on November 3rd and 4th by phone among a sample of 1,016 people representative of the French population, using using the quota method.

²⁵ Ipsos for LSA magazine. Study on purchasing power conducted among a representative sample of 1,000 French people aged 18 to 65 years, questioned online between October 28th and November 2nd 2011.

seems to indicate that 80% of French people have perceived that power as dropping over the past twelve months.

So it is strategically accurate to make the crisis THE subject of campaigns for the 2012 presidential election, especially if its expressions in France materialize in a few months in the form of increases in everyday, unavoidable expenses (energy, transport, etc.).

In this respect, 66% of the French people questioned expect purchasing power to be one of the main subjects covered during the presidential campaign, although less than 20% consider the government to be a credible player on this issue.

But at the same time, 63% claim that their purchasing power *“has stayed the same or progressed”* (Deloitte, 19th Christmas Study, 2011), which helps us understand why in 2011, unlike the majority of countries where the *“Occupiers”* were the phenomenon of the year, there was no popular revolt and no Occupy tents appeared in France.

In the same Ipsos study for LSA, only 22% claimed to be *“angry,”* a reaction that 78% do not share²⁶, which may seem strange if their personal economic situation is judged as disastrous, harrowing, totally lacking in prospects (93% of French people consider that no improvement is possible).

Elsewhere, in Israel, for example, on September 3rd 2011, 400,000 people (out of a total population of 7 million inhabitants) marched in Tel Aviv, Jerusalem, Haifa and Beer Sheva.

The subject of their exasperation, the cost of certain food products distributed by monopolies, the cost of housing, the operation of public services.

The frustration is increased by the feeling of an unbearable gap between the country’s overall growth and the living standards and conditions of the Israelis themselves: the *IMF* forecasts a growth of 5.4% for Israel for 2011 and 4.7% in 2012, whereas the price increase there is general.

Since then, the government has announced 50,000 new homes, 25,000 of which should be put up for rent at 30%; in food distribution, a policy of hard discounting and monitoring has also developed.

Elsewhere, we have seen *“global indignation”*: camping out in City centers, in Chicago, New York, Berlin, Amsterdam, Geneva, Miami, Sarajevo, Zurich, Mexico, Lima, Santiago, Hong-Kong, Tokyo, Sydney, urban violence and looters in Greece and Italy, arrests, etc.

²⁶ A point to be compared to the fact that one third claim that the drop in their purchasing power can also be explained by the fact that they have had to *“deal with one or two major expenses.”*

In total, millions of protesters all over the world denouncing the social consequences of the financial crisis.

And in France? The French occupied through procurement, as if buying (we won't say "reading") Stephane Hessel's book²⁷ was enough to experience a sacred anger.

While France is neither Bulgaria under the supervision of the IMF, nor Argentina setting fire to McDonald's restaurants, or Greece ransacking banks, the information circulating associates "the crisis" with contradictory consequences.

The French, born in the 80s and 90s, want something else: they would like to understand how they can access property, with only 27% of under-40s owning their own house in 2011.

They can no longer be satisfied with protective screens, alibis or fables such as "the crisis": yes to a one-off, tough, tumultuous phenomenon, to a torrent carrying away everything in its path, but no to an eternal pretext: there is no such thing as a crisis that lasts a century.

Two examples: poverty, housing.

Poverty

The poverty threshold is set officially at 60% of the median income, which implies that each increase in median income should impact the rate of poverty, except if the income of the poor population increases by the same proportion.

In 1996, 14.5% of the population received 803 € (constant euro equivalent), in 2009, 7.5% received an income lower than 795 €; in other words, poverty calculated in terms of purchasing power has been reduced by half in thirteen years.

The French *Cour des Comptes* (Court of Auditors) gives us a better idea of the shock absorber systems specific to France, the "prime pour l'emploi" (earned income tax credit) for example (estimated at 3.9 to 4.8 billion euros), which is paid out to nine million taxpayers.

Thanks to that measure, the income of employees paid between 0.3 and 1.4 of the

²⁷Almost two million copies of the book sold in France, and it was translated in Europe, China, the USA, Spain, etc.

minimum wage (1/3 of French people) gets a little boost, for example 134 euros for a single person working part-time at minimum wage, i.e. 20% more for 76 working hours a month.

The RSA (active solidarity income), which was expanded to French Overseas Departments on January 1st 2011, affected two million households (as of March 31st 2011), in other words 4.26 million people.

The Union Sociale de l'Habitat²⁸ assessed the growth in the number of households in a situation of failure to pay rent (for over three months) as going from 5.4% to 6.7% between end 2008 and end 2010.

The statistics bureau *Insee* announced that in France, in 2009, 13.5% of the population was living below the poverty line, as indicated by *La Croix* (September 9th 2011) with the headline ***“economic difficulties are making many families vulnerable who had lived fairly comfortably until now.”***

Final point, poverty did not appear in France in 2008 and Abbot Pierre's appeal on behalf of people facing housing problems dates back to 1954.

Another sensitive subject indeed, **housing**.

Is it the fault of the debt crisis if old housing has taken on sanctuary status in city centers, if renovation policies have systematically transformed residential housing into office complexes, if the price of old housing increased by 141% between 2000 and 2010 (new housing increased by 84%), while income progressed by 43% within the same period?

Is it the fault of the crisis if demographics are more dynamic than forecast, if divorcing families are multiplying the demand by two, if the ageing of the population is blocking access to the next generations, if the urban space only covers 9% of the French territory²⁹, if no more high-rises have been built in the past thirty years?

Is it the fault of the crisis if buildable land is rare and expensive, if the number of students rose from 200,000 in 1960 to 2,300,000 in 2010 (whereas available student housing went from 100,000 to 160,000 units), if the gap in prices between Paris, the tourist coast, the big cities and the rest of France is greater than 35%, or even much more?

²⁸ 800 low-cost housing organizations owning and managing 4.2 million homes.

²⁹ As opposed to 28% in Germany or 20% in the Netherlands and Italy.

Consequences:

- 1/4 of the household budget (1/2 for the poorest households) is devoted to housing,
- first-time buyers with no personal down payment must give up on ownership or move away from city centers,
- transport time is constantly increasing, people have never lived so far away from their workplace, in growing conditions of stress,
- the middle classes feel they are the victims of a system that the "Crisis" can accentuate if purchasing power (the household's available cash) is simultaneously attacked by new restrictions and taxes,
- the destitute and young people are likely to give up on any idea of integration and socialization.

INTERVIEW Rémy Oudghiri, Ipsos Public Affairs

Living in the present in today's France: here and now, the rising trend?

For the French, the duty to live in the here and now has been greatly accentuated over the past few months, for two main reasons:

- 1) In their eyes, the future appears absolutely uncertain; they have the impression that the current situation will worsen.*
- 2) The past is no longer viewed as a solution; nostalgia has its limits...*

Within this context, one indicator is fairly striking. It has been measured since 2006: "What mostly counts for me is to make myself happy, other people always come after." Obviously the wording of this statement is very radical, and a little provocative. In 2006, 7% of respondents agreed with this statement, in other words very few, and that's what we were expecting. In any case, we aren't very attentive to this figure, in terms of absolute value, but rather to the way it evolves over time. And indeed, it varied very little between 2006 and 2008. It began to increase in 2010 however, going from 7% to around 12%. Then it reached 16% in 2011. So it almost tripled in the space of a few years! How can this leap be interpreted? It seems to me that nowadays, people are quick to assert the supremacy of their own pleasure, even if it's to the detriment of other people. It's happening now, not yesterday, not tomorrow. If we don't do it now, we'll never do it. Of course, 16% isn't by any means a majority of people, although there is probably some under-declaration for an item worded so radically. But there is something else. The majority of people are showing themselves to be less and less negative in relation to this item. In other words, the majority of those who disagree with it has dropped significantly. Rather than expressing their disapproval, they place themselves in a position of neutrality (neither agree nor disagree). It all goes to suggest that a growing proportion of the population are increasingly understanding when it comes to behaviors that some would not hesitate to describe as selfish or, to stay within a "neutral" form of interpretation, hyper-individualistic, stating in the end: if that's the way they get themselves through the present times, well that's their absolute right... "

I think this indicator alone validates fairly well the idea that the cult of the present is increasingly on the agenda. Moreover, there are many indicators that show the return of a desire to treat oneself without holding back. The dynamic markets at the moment? Chocolate, affordable cosmetics, make-up, nail polish... You can sense a desire to inject lightness and color into life. The supreme pleasure today is also traveling. When you ask the French about their "pleasure priorities", one of the strongest aspirations is travel. They want to make the most of their lives, now, to visit as many countries as possible.

Another pleasure trend: the desire for luxury, which was somewhat disrupted in 2009, is

back with a bang, and not just in China... Because while everyone is talking about China or Brazil, the developed countries are not to be outdone. Everywhere, and this is one of the surprises of the decade that is just starting, luxury is gaining value. We are observing, and all things being equal elsewhere, the same trend as with gold. Luxury has become a "refuge value." The more expensive an item is, the more it appears as an investment and the more it guarantees the durability of that investment. You buy a very expensive watch, you can resell it, you can also hand it down. But the "investment" aspect of luxury is a mere facet of the fascination it exerts today. There is also a personal value... There is the pleasure involved in enhancing one's own value. Today, luxury is displayed not necessarily with a goal of achieving social status, but rather for personal pleasure. This is a startling phenomenon during a crisis period: some people interviewed tell us they are willing to make sacrifices for several months so that they can then treat themselves to a beautiful handbag or beautiful dress costing several hundred euros... Why? Always the same motivation: because that's what happens these days... It's a form of reward that you accord yourself.

Another significant change: we are starting to turn our backs on the 2000-2010 decade and notably with the first—and catastrophic—vision of sustainable development. We can see it in surveys, this notion is no longer as motivating as it was during the second half of the decade. People are thinking less about future generations. This is much too abstract a concept. The philosophy of sustainable development is suffering from two things: 1) it has worn out the anxiety-generating arguments (such as "the planet will disappear," "resources will run out," etc.) and those things aren't working any more, people don't necessarily want to be afraid – or their hierarchy of fears has shifted, from ecological fears to economic fears, and 2) that philosophy communicated too "globally," somewhere along the way it lost its connection with real life at the very moment when the crisis was making its mark again on consumers' minds.

Does the future still count, despite everything?

However, does that mean people have drawn a line through their future? That's where I would add some nuances. In the maturity observatory launched by Ipsos Public Affairs in 2011, we were surprised by the importance attributed to the idea of handing down. When we asked people to evaluate the criteria that enable them to say that they have succeeded in their lives, we found of course: finding their soulmate, staying healthy for as long as possible, starting a family... These are the aspirations we expect. But at the same time, a large majority of French people aged 25 and over consider that "handing down values to your children" is of capital importance. The cult of the present does not prevent a concern with the post mortem. It's a means to prolong your existence, through the values you pass on to your children.

So I would add some nuances to the "regret-free" aspect, a desire for the future continues to be asserted, even if it's clear that this is a desire that remains on a microscopic level, in other words the level of your children. It's not the planet that

concerns people, it's not humanity: those words don't work at all any more. On the other hand, they are determined to survive via their children. Hence, there's a collapse of the image of the self-centered, selfish "senior" playing his very last cards before disappearing, with no concern for his descendants. "Seniors" do want to enjoy themselves, much more so than the previous generations, the generation of their own, parents. But at some point they also want to hand something down. It's very positive, it's a type of positive that you control, it isn't a "global" positive, or a "universal" positive. In fact what's important in all that is the tendency to live on your scale. There's a lot of talk right now about the "return to the local." Behind that trend, there is the desire to be in control. Naturally, you have more of a grasp over what your children will become than over what will become of the planet...

Humanize, re-humanize: the priority for decision-makers in 2012?

The "human" theme is on an upward trend in all our surveys. In the digital age, more and more people want to connect with people rather than machines. After all, we're living in important times: to date, the penetration rate for the smartphone is close to a majority of mobile phone owners. Moreover, worldwide, the number of smartphones and tablets sold in 2011 is now greater than the number of computers. The smartphone has one particularity: it enables you to stay connected 100% of your time, in 100% of places. Consequence: you are monitored permanently and for a lot of people that's generating a desire for temporary disconnection. Not a desire to throw the new technologies overboard: there is no anti-technology movement in France today. But more and more, there is a desire to take back control from the machines and find a little enjoyment again, speaking to people face to face, speaking to your children, your family... And even in relation to themselves, more and more individuals want to take a step back, and increase their personal creativity.

Another striking development: the store – I mean the physical location – is taking on more importance. Consumers value the advice they are given at a physical place. In contrast, the blogs that had the wind in their sails a few years ago are declining in influence. People accord them less and less importance. Admittedly, that has always been a phenomenon with opinion leaders, but now it's really dropping...

Finally a few words about the "no bitterness" phenomenon, the Occupiers and certain paradoxes...

On the "no bitterness" level, there is one interesting phenomenon: the relationship with rich people. It's particularly paradoxical in France. The French middle classes don't seem to have conserved any bitterness toward the "rich." In 2007, we introduced the following item into our observatories: "earning a lot of money is indecent." A minority (around 30% of the people interviewed) agreed, that increased in 2009 (right in the middle of the crisis), but not by much: 3 to 4 points. In 2011, it dropped again whereas we might have expected the opposite. Despite the persistence of the economic crisis – despite the

worsening of the situation of the most fragile individuals, and despite the increase in long-term unemployment – the most striking thing is that there is no revolt in France against the super-rich... There is a revolt in the media, among a number of intellectuals, activists, etc. We seem to have gone no further than indignation – and a temporary indignation at that... A fine enigma for 2012...

[By the way. Who are we talking to?]

Who feels concerned?

Who feels abandoned?

Community marketing, ethnic gay, Islamic, tribal, identity, bobo, Kosher, rap, organic, urban, generation X, Y, C, ultra-luxury...

Actions targeted according to age, income, with increasingly precise criteria, anti-discrimination or positive discrimination laws, visible minorities, electoral fine tuning: increasingly specific targets are being isolated into typologies, so what remains of the ones who don't exist in, or who can't relate to, any of them?

These are the neither-nors of advertiser strategies or electoral promises, the men and women who are not included in the categories defined by media plans, spin doctors, etc. Neither recomposed, nor restructured, just too ordinary ...

Too simple, too basic, too mobile or right in the center? Just the average customers of average brands? Just users watching passively as post offices close, classes are regrouped, SNCF stations or lines disappear?

Owners of houses in exurban areas, victims of the unraveling of public services, obliged to have a car to do any shopping at all, because there is no longer a store or cafe nearby, isn't anyone interested in them?

A paradox that is even greater given that this population, who feel as though they no longer see themselves in advertising, who are no longer consulted, who are disappearing from the media and political landscape, still represent the biggest sales or electoral volume.

So for them not to feel distanced and misunderstood, they have become a communications challenge in terms of anticipating various types of risk. In marketing, if they feel that their tastes, lifestyles, preferences are not valued, they may move away from brands that aren't speaking to them any more.

In politics, from silence to frustration, and not necessarily being mixed-blood French citizens, they may radicalize their feeling of abandonment in a vote vindicating their own neglected identity, their fear of a loss of social status, their dread of a return to proletarianization. Are they Marine Le Pen's "*silent masses*"?

In the media, they only exist in the news in brief and small ads of the regional daily press, whereas the national daily press has nothing to say about them, assimilates the

everyday lives of normal people with simple “man bites dog” stories, and TV programs make fun of them.

All the above reasons may explain the success of Jean-Pierre Pernaut’s news program on channel *TF1*, the last and only setting where they can still see themselves exist, as they are.

Moving from niche marketing, from local strategy to global discourse, getting back to the mass market after years of criticism, that’s one of the challenges advertisers and politicians must face.

What personality is able to unite millions of people? What collective mirror? What mythology on the scale of a brand or a program?

The *Tour de France* played this role perfectly, with exceptional success in 2011. Every afternoon, 4.3 million viewers followed the adventures of Thomas Voeckler or Andy Schleck on France 2, in other words a 40% market share, its best score for six years. The mountain stage between Pinerolo and the top of the Galibier Pass was watched by 5.9 million viewers.

Admittedly, the final of the *Soccer World Cup* in 2010 attracted 14.1 million viewers (63% audience share), better than the final of *Roland Garros* 2011 (36% with 5.3 millions).

These spectacular events consolidate most of the values that characterize France: valuing of the local, nostalgia, regional roots, the unchanging nature of things, and sudden twists and turns, return of the epic adventure, promise of success... A whole electoral program?

We’re far from the housewife icon of the 1970s with François Hollande wanting to be the hero of Madame Dugenou, the allegorical character invented by Nicolas Sarkozy, when he stated **“when I say I’ve talked about it to Obama, Hollande will say that he talked about it to Gérard Dugenou, mushroom picker in Corrèze.”**

As if this endearing Dugenou couple were the incarnation of normality, prompting former First Secretary Hollande to jump to their defense: **“Nicolas Sarkozy made fun of it saying that he met with Barack Obama while François Hollande met with Madame Dugenou. Well, yes, my role at that moment is to convince Madame Dugenou.”**

Is normality becoming a global, political, advertising and communications challenge?

Or consider another scenario, nothing is normal any more, because no one is there to listen and the public is elsewhere...

INTERVIEW Dominique Levy, Ipsos Marketing

Consumption is a combat sport

The “temples” of consumption have become arenas.

For the vocabulary of marketing to be borrowing from the lexical field of war is nothing new: conquer, win, aim, target are well-established classics.

For the vocabulary of French consumers (“housewives” turned “shoppers”) to resemble guerilla language is more recent. Aware of the “traps” set for them, they remain “on their guard”, go off “on reconnaissance,” use “ruses” and “strategies,” go out “armed” and come back “conquerors” or defeated. The transformation of “shopping” or “shopping session” tales into campaign journals, a transformation that our profession exposes us to daily, has to be meaningful.

What is it about? Yet another avatar of defiance? Certainly, but it’s not just that: the offensive has changed camp.

Portrait of the warring parties

On the one hand, we have brands, increasingly aware of their fragility, the pressing need to constantly renew the experience they are offering their customers.

On the other, we have us, consumers of all levels, of all ages and of all styles, driven by the same, universal motivation: get our time’s and our money’s worth. And for some people, one thing: power belongs to the one pushing the shopping cart.

*Here I would like to come back, first of all, to this notion that is central in my eyes: **offering an experience**. This is one of the key points of the recent evolution in offer-demand relations; whether for goods or for services, everyday consumer products or more exceptional ones, the purchase is described and viewed as an experience, in other words as a series of feelings: a need or a desire, a worry or an impulse, a decision that is more or less thought-out, more or less matured and a result that is as emotional as it is material: I did well (or I did badly). As should be clear by now, the whole thing is totally egocentric.*

Needs or desires can be infinitely varied in nature, impulses can be more or less pressing, decisions weighed carefully or totally irrational, yet all purchase processes have a common point: they are first evaluated based on the personal experience of the individual describing them: satisfaction of the “shopping post-grad” leaving the supermarket “with not one product too many.” Total excitement of the techno-savvy shopper who is “doubtless one of the first in France to own this thing, it’s insane.”

Amazement of the young woman in front of the “treasure box. Magic,” as the stores of some big perfume brand appear to her.

One common point to these tales appears. The brand, the store, have as much value, if not more, in terms of the effect they have on their customers than in terms of the service they provide. There’s no question here of a contract, a commitment, attachment, loyalty, but rather of experience, a shared moment and – above all – a narcissistic benefit: I like the brand for what it does to me, for what it has me experience.

The shift (from “brand contract” to “permission to experience”) is a fundamental one. That’s what has profoundly altered the offer-demand power struggle and is introducing—de facto—the notion of combat in consumption.

The brand, brands, were designed to serve as reference points, or even guarantees. In the old world, they were enough to lastingly spare products and buyers: thus labeled, products no longer had to prove themselves (or less so in any case), and the buyer’s choice was simplified as a result.

This mechanism remains partially active. But is gradually wearing away in favor of a new dialectic: the brand is increasingly decoded as an ambivalent artifice. In the same movement, it generates desire and distrust. So the aim is to own it without being owned, and no longer to set up a relationship of confidence with it.

Love, in this area, doesn’t last three years; far from it. If I only love you for the experience you give me, I’ll leave you at the first negative experience. Or as soon as something else comes along that seems more tempting or more advantageous.

So the consumer is not a gatherer but a hunter. And, what’s more, a hunter who is admittedly armed and aware of it, but essentially worried.

Of course, worry is born from the coexistence of fear and desire, but also from the increased number of solicitations, and their rapid renewal.

As a result, making a choice becomes a relatively complex exercise: finding the right product (with “right” in this case being as polysemous as it is changing), but also the right place and the right moment for getting it.

The exercise is even more problematic for the fact that it intervenes within the context of a shortage of resources that is felt massively. Our recent study on purchasing power (December 2011) taught us that 31% of French people claimed to “do their shopping to the nearest euro.”

The stakes are tougher. The weapons are many

We're not talking about returning to the whole arsenal of opposition forces and alternative means of obtaining things made accessible by the new technologies, but rather about wondering what this new situation has changed and should change in our way of thinking about marketing.

From this point of view, the year will have produced a multitude of theories, and of contradictions: is consumption collapsing in this country? Are consumers weary, frustrated, angry, distanced? Are brands dead? Should we market proof, or emotion? Dream or transparency?

These questions punctuate the everyday lives of our customers, and so our lives too. An everyday life that is also legitimately placed under tension by this crisis, not knowing whether, or in what state, consumption will come out the other end.

All the observations are well-founded: low-cost is growing at the same pace as luxury. The fine stories of mythical brands continue while others disappear into general indifference. Purchasing power is an almost general subject of concern and anger but, as the battle rages, the sales continue...

What can we conclude? That in war as in love, all is fair. And that the consumption field increasingly seems to stem from these two intermingled domains.

Right now, brands are lagging behind consumers. It's paradoxical, but the large majority of them are, ultimately, less cynical than their customers, willing to believe, still, that they can be loved for what they are, whereas we're happy to take them for what they do. It seems to me that they haven't yet completely understood that the fight has changed nature, and that power is in the process of changing camp.

The end of marketing won't come from an ideological challenging of the "consumer society." It will come from the appropriation and misappropriation of its techniques and resources by those it was supposed to bring to heel: us. The consumer has not— as we might have thought a few years ago—become a "marketing man," taking charge of or sharing the role of the advertiser. He is learning to use the strengths and tools used by brands to his own benefit, to get around them better.

So today, we marketing people need to learn this new game, learn to integrate the criticism of our practices into our practices themselves. One small example (will become bigger?) to meditate on, the example of Michel and Augustin who have made "non-marketing" their key marketing argument. The most cynical one, once again, is not the one you think...

From consumption as a combat sport to marketing as a martial art...

[Resiliencies]

[Observations]

Closing the book on morale

The rise in morale among the French in July (+ 3 points, the first increase since November 2009), the fact that they believe in a financial improvement (+ 2 points) and a greater capacity to save (+ 7 points), their confidence in their future standard of living (+ 3 points) had been interpreted as a breath of fresh air.

Then, in early September, the picture turned black: 75% of French people claimed not to trust the government to reduce the public deficit, 82% claimed to be *“somewhat less confident”* about the economic situation of France (+ 19 compared to July) whereas 17% were *“somewhat more confident”* (– 17 points).

You have to go back to the Lehman Brothers bankruptcy in October 2008 to find an equivalent gap of 65 points.

The final sign of pessimism, by late October, 80% considered that the debt crisis is *“the most serious”* in recent years, 57% are preparing for *“painful and difficult measures,”* 53% of French people claim to be *“revolted.”* And, first surprise, the next day, the general indicator of confidence in households (referred to as “morale of the French”) progressed by two points (82) compared to September 2011.

“More households than in September consider this a good time to make major purchases and judge the moment as more favorable than in September for saving,” commented the Insee.

Save (from 16 to 17% of gross available income) AND spend: not exactly compatible with the definition of “Crisis” in academic or economic dictionaries.

Other surprises.

In July, vacation reservations were up by + 4% and it wasn't the *“crisis”* that divided this prospect in two, but the weather. Bad weather shortened stays by 15% and led to postponements or outright cancellations. Result: three million hotel nights lost... in France.

Five hundred thousand French tourists thus reserved at the last minute for a destination far or near, but sunny.

Frequentation of holiday villages and tourist residences referred to as *“de bon confort”* (2-star+) increased by 3%, while furnished apartments, holiday villages, lower-end

residences and rural hotels fell by 5%, and bare tent sites by more than 10% compared to July 2010.

As with consumer goods and distribution, anything **“average”** is suffering, anything decided on at the last minute saves the day, anything that corresponds to a high-status image of value for money is attractive.

The balance sheet for summer 2011 was more than satisfactory, with an overall growth in tourist activity in France and a volume of hotel nights up by 3.1% compared to July-August 2010, with August actually higher than July, with a 3.6% increase in hotel nights as opposed to 2.4% in 2010.

Those who stayed in France traveled more than in summer 2010 with, for example in July, a going-away rate up by 1.3% and longer-lasting stays (+3.8%).

Those who did go away favored Spain, which went from 6th to 2nd place in vacationers' search rankings (+ 42% of online requests compared to 2010).

Tunisia and Egypt, by multiplying their promotional offers in July-August, managed to secure their customers' loyalty, while new destinations emerged, such as Croatia (+ 23%), Madeira (+ 17%) or Bulgaria (+76%).

Further away, tourist visits to Guadeloupe increased by 7%, 25% for Mexico, 16% for Thailand.

Later on, in November, we learned that **“consumption seems to be pulling the French economy,”** with activity ultimately progressing by 0.4% from July to September, with different prospects for stagnation envisaged for the second quarter with – 0.1%, “less bad” than had been forecast.

Household expenditure had increased by + 0.3% by the third quarter, after the – 0.8% drop in the second.

With regard to Christmas, the fourteenth **“Christmas Study³⁰”** was clear: 75% of French people consider that their country is in a recession, 1/5 expect a recovery for the following year (as opposed to 1/3 in 2010).

So... Restrictions? Sacrifices? Prayers?

Not really. 48% claim to be **“willing to spend more to enjoy myself and forget the**

³⁰ *Deloitte*, study conducted among consumers from 17 Western and European Countries and South Africa during the 2nd and 3rd weeks of September; 18,354 interviews including 1,757 for France.

crisis,” 43% say that they could “crack for a pleasure item if retailers made an effort on the price.”

Traditional toys are in competition with hi-tech products, plans to buy a tablet have multiplied by four, and by two for smartphones.

The desire for brand names isn't weakening, on the contrary: 30% more people from lower socioprofessional groups than in 2010 wanted to give brand-name products as gifts at Christmas.

To go back to Deloitte's analysis, *“the French want to give more gifts, better quality gifts and more expensive gifts.”*

Concerning vacations, the average planned budget for a stay in a hot country is estimated at 2,035 € per household, and for holidays in the mountains at over 1,300 €.

Employees with no regrets?

The company is not really the place for expressing regrets. It's more about moving ahead, innovating, meeting new challenges—isn't the crisis synonymous with opportunities, as many managers like to repeat? Regret, and even more so failure, are words absent from the managerial rhetoric. On the other hand, when you listen to them, employees will readily express their regrets and nostalgia: "we used to have time, we had staff, we knew each other, we were a team, we got bonuses and increases, we could make a career..."; productivity efforts, process acceleration, internationalization of trade and companies have all had their effects, with more than a few flagship reforms, such as the establishment of the 35-hour working week.

However, setting aside labor movements, which are increasingly sporadic and—with a few exceptions—not really followed, the expression of those regrets has rarely led to a set of demands, as though employees had finished grieving for the company of the past. Should we deduce from this a loss of motivation or a loss of commitment on the part of employees?

At this stage, we should probably consider the familiar distinction between private action and public action, and draw a parallel within the company itself: could we thus distinguish the "private" sphere of the workforce, the work unit, and the "public" sphere, the company as a "global" organization?

It's in relation to the latter aspect that we can measure a lesser commitment, essentially due to a loss of credibility of the managerial discourse, itself accentuated under the effects of repeated crises. In contrast, the "private" sphere is overinvested, with employees who, more than ever, are looking for accomplishment and pleasure at work. Never have the content of work, the ambiance at work or respect had such great importance, in a universe that seems increasingly blocked to many people, It is no small paradox in relation to the company to see studies show managerial and evaluation practices that are ever more professional and widespread, whereas the prospects for professional or salary development seem to have come to a dead halt.

Moreover, the corporate world has taken this new situation into account (of course partly under pressure from the propagation of psychosocial risks), through increasing investment in the field of well-being in the workplace. This goes largely beyond the domain of health at work. An increasing number of colloquiums, trainings, preventive actions, new services are being organized around the notion of well-being, a new stated corporate goal, admittedly with a few regrets sometimes! One might also wonder about

the consequences of this new priority (reflection? accelerator?) given the guilt-free infidelity or complex-free hedonism of the French.

Finally, it is often said that the new generations disconcert their “elders” by their behavior. But is this generation Y so different from the previous generations? No, not if you look at the findings of studies conducted among employees on their experience in the company. So, shouldn’t we instead view these testimonies as an expression of how confused these “elders” are in the face of demands that they don’t really have and that they don’t feel the capacity to lay claim to? Nevertheless, everyone can be reconciled within the private sphere of the company through a new form of connection, “achievement without commitment.”

Closing the book on wait and see

In physics, resilience³¹ is the *“mechanical characteristic defining a material’s resistance to shock. The resilience of metals, which varies with the temperature, is determined by provoking the breakage through impact of a standardized test tube.”*

The term has been transposed into the psychotherapeutic domain to designate the capacity of individuals to get over their traumas.

The neurologist, psychiatrist/psychoanalyst Boris Cyrulnik popularized this notion in France, defining it as *“the art of navigating through torrents.”*

When applied to French society, it is expressed through the intention of moving to a new attitude: freeing yourself from a collective that bores you, moving away from constraints, asserting yourself.

We can see it in the quantity of words that fatigue the French. Following on from ecological self-righteousness, the politically correct, laws with an increasing impact on everyday life, the prospect of *“effort” “won’t swing it.”*

57% of French people state that they are not willing to *“give up a little purchasing power to reduce the debt and deficits,”* expressing their choice: pure and simple denial, because *“the crisis is others.”*

In November 2011, the refusal by parliamentary representatives to lower their compensation payments was typically the bad example, triggering *“nausea,”*³² with the French not wanting to be the only ones to bear the consequences of a situation that they feel neither responsible for nor guilty about, and which will penalize them primarily if new austerity measures are taken.

The sharing of efforts is at play here, leading to a demand for fair distribution, because representatives’ income is not judged as proportional to their actual work, they must be exemplary, and they are also citizens who must contribute to plans for getting out of the debt and euro crises

A sign of a break between the collective and the personal: there is no longer a rational link between the morale of the French and voting intentions, confidence in the future and purchases of goods, prospects and desires.

³¹ Larousse dictionary.

³² Ipsos online community “France(s) 2012.”

Likewise, there is no coherence between the reality of the financial crisis in France and perception of “the crisis in France” by the French.

Has the ambient moroseness had an impact on the purchase of iPads or smartphones, hotel occupation rates, the thousands of kilometers of traffic jams during the holidays, the crowds who throng to paying concerts, the growth in leisure spending³³, the 73.2% of households owning one or several computers³⁴, the 67 million mobile phones³⁵ in France (103% of the French population)?

The French are saving and spending billions of euros³⁶ simultaneously, an adverb that doesn't really correspond to the notion of “crisis” in the sense that the Argentines, Greeks, Irish, Spaniards, or others would use the word.

However, as in politics, the advocates of the traditional systems are complaining: Sales are less of a success. Same for electoral promises or ice creams costing 2.50 euros a scoop. From this point of view, yes, it was better before, when “people” didn't compare everything, played the game, spent without counting.

Now, people count what they spend using other criteria: the equivalent in francs (16 francs for a scoop of ice cream, 250 francs for a kilo of red meat at the butcher's), the possibility of grouping purchases to negotiate prices, “last-minute” rationale, etc.

Attitudes have changed in less than ten years, like it or not: it is pointless, indeed absurd, to ritually expect two windows of opportunity in the year, when all year round you can buy for less and in a different way. Behaviors too: why go anywhere? Why wait? Why line up?

Online / physical, pragmatism / pleasure complement each other, at the service of different types of experience.

³³ From 2008 to 2009, purchases dedicated to equipment, subscriptions, games, video, telephony, sound, images, micro-computing press, Internet progressed on average by 4.3% with a 22% increase in Internet spending. The French devote 11% of their total media and multimedia spending to the Internet, i.e. an average of 2,324 euros per household.

³⁴ +2.1% in comparison to 2010, + 10% since 2008.

³⁵ During the third quarter of 2011, recruitment doubled with almost a million extra mobile customers. Bouygues Telecom, Orange and SFR count 57,542 million customers and are in progression after 2 bad quarters. Virgin Mobile, NRJ Mobile, Prixtel... count 6,857 millions customers with 10.65% of the mobile phone market.

³⁶ 1.446 billion euros in life insurance support, 744 in regulated savings, 517 in unlisted shares, 497 in securities. Total: a cushion of 3,204 billion euros.

In 2010, online purchases represented 31 billion euros in sales, with very favorable forecasts (37.7 billion in 2011, 45 billion in 2012): eBay, Amazon, cdiscount, priceminister were the winning quartet of 2011. 28 million French people buy online (72.5% of webservers) and the number of cyberbuyers over 65 years old increased by 73% in 2010.

Clothing and shoes, cultural products, stereo systems, video, computers, toys and games... all the product categories can now be bought online, including gardening and DIY.

In 2011, sales for the *vente-privee.com* site were greater than one billion euros, with the goal of developing a maximum of products in addition to selling brands' overstock.

With 15 million members, 2 million of whom go online every day, *vente-privee.com* now offers show tickets, wine sales, vacations, smartphones and tablets (which represent 13% of sales).

From October 30th to December 31st, 52 billion euros were spent on online purchases, with a 19.8% increase compared to the same period in 2010. The winning trio: the United Kingdom (15.6 billion euros), France (7.5 billion), Germany (7 billion euros), in total 57.9% of online sales in Europe for 100 million e-consumers³⁷.

Final paradox, in November 2011, the "morale" of households in relation to the economic situation was deteriorating (- 3 points), at its lowest level since February 2009, while 53% positively answered the question "*would you say that you are very, fairly, not very or not at all optimistic about your future?*" and 66% "*would you say that you feel at ease in your everyday life with your income and/or the income of your household?*"³⁸

³⁷ <http://www.journaldunet.com/ebusiness/commerce/depenses-e-commercenoel-1111.shtml>

³⁸ Ipsos IREP/ARPP –The French and advertising (sample representative of the French population, 1,002 people aged 15 and over. Fieldwork conducted on 7th to 9th October 2011).

INTERVIEW Bruno Schmutz, Raphael Berger, Ipsos MediaCT

An absence of regret is said to be the new norm of society. Isn't it paradoxical then that the feeling of nostalgia has never been so strong, as shown for example by the recent craze for 1960s vintage?

Raphael Berger – More than anything, we need to define what we mean by nostalgia and regret. Indeed, in the notion of regret there's an idea of nostalgia, the words are partially synonymous. You mentioned the return of the 1960s – which seems to be wearing off lately: nostalgia isn't a structuring analysis of our society because in any society there is always that feeling that "things were better before." It was the case at the start of the Roman Empire in evoking the golden age of the Republic, it was the case in the Renaissance in evoking Rome, or the romantic Middle Ages idealized in the 19th century. Consider the moral of the last Woody Allen movie Midnight in Paris, which is based on this very principle.

The notion of regret is more complex: first of all it's a desire for a return to the past, but it also expresses the fact of not having accomplished a personal action in the past. Regret stems from its own actions: the individual builds his own regrets when he subjects himself, powerless, to nostalgia.

Now to answer your first question, in the area we're talking about here, the media and the new technologies, there isn't a shadow of regret, on the contrary! Admittedly, we can see the appearance of certain retro-futuristic products, such as the LG retro series 1 cathode ray TV with its 1960s look or the "hands busy" kit for the iPhone, but these are anecdotal.

Do you think no one feels any regret for the world without the Internet?

Bruno Schmutz – I don't totally agree with what was just said. Yes, nostalgia is eternal, but the craze for innovation is just as eternal! At every period in history individuals have gone crazy over technological progress.

Naturally, the digital revolution underway is bringing a series of undeniable benefits: accessibility to content, speed, free of charge...etc. With these innovations being distributed on free markets, obviously their success comes from their capacity to satisfy a demand, meet a need... If consumers didn't get any satisfaction from it, if they got no benefit, they would fail. By construction, this progress is happening because individuals not only accept it, but they want it too. The increased speed with which new things are distributed reinforces this idea. How can we claim that an evolution so ardently supported and integrated by consumers can be simultaneously regretted?

Obviously, the answer might change if we shift the point of view; if we stop adopting the consumer's point of view in favor of brands' or institutions', for example. Indeed, terminal and digital networks have greatly increased the power of the masses, who can now connect, exchange, judge, comment, share, pirate... Public opinion has become more expert, more liberated, harder to grasp. The traditional sources of authority are destabilized by this. The participatory dynamic that the Internet has enabled is an opportunity for exchange, and therefore for rapprochement. It has also, and primarily, brought a re-balancing of power relationships.

Maybe some of these authorities regret the pre-digital period, when relations were more unilateral, less conversational. When a consumer used to wait for a product to go on the market to access it; when he was willing to pay the price, or even to pay, "period"...

Raphael Berger – *Personally, I think no one basically wants to go back to the world of "before." It's neither desirable nor possible. The younger generations (under-20s) have always known the Internet, the mobile phone, ... Now they may feel some amused nostalgia for a phone with a dial, but take away the smartphone from a teen for a week and you'll see for yourself: going backward would be unimaginable.*

The observation is also true, and more interesting, for the generations who knew the analog world, in other words people aged 35 and over: like the current 70-somethings, who became perfectly accustomed to the mass diffusion of TV and telephone in the early 1970s, whereas they were around 30 at the time, these individuals don't miss the previous technologies, the pre-Internet media habits. When they do have a choice, they live in 2011, not 1991.

Take the example of listening to music: admittedly, the vinyl (33 rpm) record has survived, its sales have even progressed a little in the aisles of the Fnac (entertainment retail chain) over the past ten years, but buying a vinyl record isn't about regret, it's about distinction! It's expensive, it's oil-based, it's heavy, it takes up space, it's fragile. In other words, it has no advantage compared to online music. So, it operates as a luxury product. Alongside it, Deezer is targeting one million paying subscribers³⁹, Spotify is also doing very well and we've lost count of the number of illegal downloads. So, for 5 to 10 euros a month, the consumer can access millions of songs, unlimited, even on his mobile phone. In the end, no one really misses the 33 rpm for 20 € and the physical market – except for record sellers maybe...

Video games provide us with another illustration. The first consoles date back to the late 1970s, some players aged 30 or 40 years may remember with nostalgia their first Atari and PacMan console, their first Game Boy and the Pokemon. The current celebration of

³⁹ <http://www.lefigaro.fr/societes/2011/06/05/04015-20110605ARTFIG00255-deezer-vise-le-million-dabonnes-payants.php>

video games (exhibitions at the Grand Palais in late 2011, Arts et Métiers in 2010, the Pixel short film in 2010, etc.), while institutionalizing an underground leisure activity – I would even say a form of “entertainment” – primarily shows a nostalgia for the childhood of these adult “gamers.” But that doesn’t mean people miss those 8-bit consoles.

Finally, who will sincerely regret the low-speed Internet, the days when you had to wait several minutes to receive email? Who sincerely wants to return to the Minitel and having only 2 TV channels controlled by the ORTF? Only Rousseau would regret that, but what would give him the desire to walk on all fours?

Bruno Schmutz – There’s no doubt about it, digital gives more: more content, more information, more TV channels, more exchanges, more comments, more contacts, more “friends.” Does this giddy race still meet a need? Take the example of the digital book, which can contain thousands of works. The digital book, a personal, on-the-go library. What is the real benefit? A heavy reader will read 30 books a year, and never more than a few at the same time.

Thanks to digital, the consumer gets “more,” but the same applies to brands. They can create and permanently update their databases, keep track of the consumer’s behavior, his searches, his spending... Individuals are increasingly recorded, profiled, located. The development of digital is therefore raising new concerns, new fears linked, for example, to the respect for private life.

Digital makes all content accessible immediately, all the time. It provides much “more,” and “faster.” Here again, if this offer has been so successful, it’s because it is meeting a demand. It’s difficult to imagine that the consumer regrets uses, whereas he is developing them at a hitherto unseen speed. More than 30% of French people now have a smartphone, the time spent on the mobile Internet is constantly on the rise. Tablets have scarcely existed for two years and already 10% of Americans have one. However, certain individuals are starting to feel the counter-effects of this frantic race. The “slow” trend is appearing, with slowness and a relaxed pace being extolled. What about taking a break?

One final point. “Plus” doesn’t always mean “better.” One of the strong trends that has come with digital is the development of multi-tasking. Owning several devices means that individuals now carry out several tasks simultaneously. For example, a young person watches a TV series while simultaneously looking at his Facebook page on his PC; or even, watches a series on TV, consults his Facebook on his PC and is on the phone, simultaneously. This agility is both astonishing and intriguing. How much mental, intellectual capacity does it require for an individual to carry out so many tasks alongside each other? His experience is probably both more intense and more superficial. The simultaneousness of his activities demands a certain level of concentration, but that concentration is, paradoxically, becoming dispersed. Should we delight in this? Or should

we regret it?

Raphael Berger – *We're living in the society of hyper-activity and hyper-choice, caused by the constant increase in the number of products. From that point of view, the digital society does increase the risks of regret. The more alternatives there are, the greater the risk of regretting your choice!*

Having regrets means telling yourself you didn't do everything, that you failed in some way. You need to have tested everything, just so you can say "no regrets." Baudrillard explains that very well: individuals are driven by "a general curiosity (...), by a diffuse dread– it's the morality of fun or the obligation to enjoy yourself, to exploit every single possibility to be excited, elated, gratified"⁴⁰. This is a general phenomenon that applies perfectly to cultural and media behaviors: test everything, constantly discover new things, that's a positive trend– not confining your tastes, being open to the unknown– but also a negative one – flitting around, zapping without every going into anything in depth. The truth obviously lies somewhere between the two, subjective and personal. It's all a question of balance between these two trends!

Ultimately, this "no regret" idea may be stronger in cultural and media practices because the innovations stemming from the new technologies have been very quickly assimilated into our everyday lives. And also, perhaps, because in the end, even if we were fine without it, things are better with it! And so, no regrets...

⁴⁰ J. Baudrillard, *La Société de Consommation*, Paris, Gallimard, 1970.

Closing the book on austerity

Taboo of taboos, the duo from hell, “**rigor**” and “**austerity,**” have made their comeback, menacing the balance sheet and popularity of the “**Purchasing power president.**”

Late 2011, the rate of tax and social security deductions was 43.6%, as opposed (before the next retroactive finance law...) to 44.5% in 2012, after 40.7% in 2000.

Now, as the Prime Minister explained, we must increase the taxes financing the State and Social Security budgets, 1 billion in 2011 and 11 billion in 2012.

Most categories and sectors are concerned by some thirty different taxes, some of them created in the name of necessity, others in the name of debt or the “crisis.”

Individuals are primarily concerned by:

- The increase from 6% to 8% in social contributions, from 3.5% to 7% in taxes relating to health-mutual insurance (mutual insurance companies, welfare institutions) and from 7 to 9% in state-approved complementary health insurance.
- Stamp duties (forecast renewal of the national ID card, introduction of an authority as part of the reform of jurisdictional assistance).

The most affluent by:

- The extra special tax on high incomes (additional 3% on income between 250,000 and 500,000 euros and 4% for over 500,000 euros), which is supposed to “stop one day,” when public finances are considered to have reached a balance.
- The taxing of unrealized gains on the transfer of tax residency to a foreign address.
- A tax on rents for small-surface-area apartments with a price over 40 euros a square meter (10% to 40% on the rent).
- The new tax schedule for capital gains on immovable property with allowances according to how long they have been owned: zero before 5 years, 2% a year between 5 and 15 years, 3% from 15 to 25 years, 10% over 25 years; after 25 years, the accumulated allowance will be 50% and will be total after 30 years.

The food industries, catering and the hotel trade, notably with the tax on sodas and sweet beverages; this places a 6.22 euro tax on every hectoliter of artificially sweetened beverages and doesn’t spare artificially sweetened beverages.

The oil industries, with the special contribution relating to the price increase provision.

Financial companies and establishments holding capitalizations of over one billion euros, with the financial contribution on market capitalization.

Private players in the security industry, with a tax that will finance the Conseil National des Activités Privées de Sécurité.

Banking establishments, with the systemic risk tax aimed at dissuading or compensating for the cost of resolving crises resulting from this risk and the reduction of exemptions for the corporate social solidarity contribution (C3S).

Private railroad operators using the French railroad network, with the territorial solidarity contribution and tax on results.

Not forgetting the special equipment tax to the benefit of the Société du Grand Paris (transport network for the Paris area), the annual contribution to the benefit of the Institut de Radioprotection et de Sûreté Nucléaire (radioprotection and nuclear safety institute) to be paid by owners of nuclear energy sites, the special tax on trader bonuses, the tax on processing of vehicle license certification, the ecotax on heavy goods vehicles, the integration of overtime into the calculation of reduced charges on low salaries, the increase in social contributions on capital income.

Still to come: a variety of measure to close off tax loopholes, the calling into question of several exemptions relating to social contributions, radical reductions in public spending and, very probably, consideration of taxation for households with no charges...

Many pensioners own their own home, have no loans to reimburse, and have no children at home. With a pension of 1,700 euros, they have more available cash than a working person in debt with an income 30% higher. Moral of the story: no financial argument can take issue with their contribution nor with a **“special effort of intergenerational solidarity.”**

From 1996 to 2009, the average standard of living for pensioners represented 96% of the standard of living of the working population. There are differences when income from assets is integrated, with the standard of living of pensioners rising to 101% of that of working people if the rents counted are gross, and 104% if the rents are net.

The average pension for the generations born between 1924 and 1942 has increased **“due to the series of pension reviews, the extension of wage earning, the correlated decline in non-wage earning, the progression of working periods for women and the general increase in the level of salaries. Another factor in the progression of the level of pensions within the general system: the gradual increase in charges relating to complementary retirement systems, which were generalized from the 1970s. On the other hand, the basic amount of the pension is no longer increasing, with the factors on the rise (progression in salary levels) and dropping (effects of the 1993 reform, notably before the switch from the 10 to 25 best years in calculating the reference**

salary) canceling each other out.”⁴¹

Consequence: levies that will no longer take people’s status into account, but just their income; in other words, the fiscal revolution.

All that would happen after June 2012, if possible.

Meanwhile, financial transactions by individuals are accelerating; they are incited by the banks which, since the Bâle III agreements, have been creating new and attractive products to compete with life insurance and have access to capital stock to cover their balance sheet risks.

Since banks need to cover their backs, within a context worsened by increasingly costly euro funds, their siphoning strategy is accelerating: after 1.8 billion euros in September 2011, the outflow of life insurance represented 1.4 billion euros in October and 3.2 billion in November.

These sums are mainly reinvested in favor of savings accounts, real estate, dependency insurance and retirement-savings plans. For some pensioners and households not wishing to resort to consumer credit, they are used to inject fresh money, make up for a lack of cash in the household due to extra charges.

Relief, or backlash?

The 7-billion euro austerity plan announced on November 7th was judged as “**less bad**” than forecast, within a context in which “**the word bankruptcy is no longer an abstract word,**” to quote the Prime Minister.

It implies extra savings of 500 million euros on State spending, an increase in the reduced VAT rate from 5.5% to 7%, an acceleration of the pension reform schedule, a 5% increase in the corporate tax for companies with sales of over 250 million euros, the elimination of the Scellier system⁴² relating to access to property, the freezing of scales for income tax and the ISF (wealth solidarity tax), and for social services (1% in 2012), aside from minimum income levels and replacement incomes⁴³.

⁴¹ “*Liaisons SocialesQuotidien*,” 28/11/2011 and www.wkrh.fr/actualites/upload/COR-23-11-2011.pdf

⁴² The *Scellier* system enables people who buy and rent new housing to enjoy tax reductions; it has enabled the construction of 170,000 homes since 2009 (75,000 are planned by December 31st 2012 for a cost of 2.3 billion euros).

⁴³ Retirement pensions, active solidarity income, disabled adult income, the special solidarity benefit paid to the unemployed when their benefit rights come to an end, the old-age minimum intended for the lowest-income pensioners will continue to be reviewed taking into account both growth and inflation.

The flat rate withholding tax goes from 19 to 24%, in the name of a desire to “reduce the taxation gap between work income and capital.”

And late December brought the prospect of a recession, the word that had been missing in order for collective prospects to turn black, as if all these measures were pointless, since the rating agencies had seized power.

INTERVIEW Fabienne Simon, Ipsos Public Affairs

Could the Euro disappear... with no regrets?

In response to the Euro crises (Ireland, Greece, Italy...), last-chance European summits and threats regarding France's AAA status, the question of our currency found itself back on the agenda. Ratified by a small majority of French people on September 20th, 1992, after some bitter debates (Maastricht Treaty), the single currency, which slipped easily into habits and wallets in January 2002, remains controversial for a part of the population.

In November 2011, 62% of French people considered this currency to be a handicap for their own purchasing power, an eminently central concern. But does that mean that they see a solution in the return of the franc? The equation isn't so simple and the French don't seem to have been converted to the plan to "throw the baby away with the bath water," with one third of French people (36%) using their votes to call for a return to the national currency. In other words, a proportion that is large, but far from equaling the share of those who think that the currency penalizes their purchasing power. In the gap between these two figures, there is an attachment to the European idea, which carries peace and freedom, the desire to see the European institutions strengthened, the need for economic and financial regulation through this level, but also hopes – even hopes tinged with defiance – of a resolution of the crisis. While one out of three French people claims to be willing to turn the page, the large majority of the population still reject the idea of abandoning the single currency, possibly indicating the start of an attachment or at least a step backwards that would not happen with no regrets.

[Enjoy !]

Maybe the French have finally decided to live in the pure present?

That approach is already shared by the five million Americans who ensured the success of *“The Power of Now”*⁴⁴, now translated into more than thirty-three languages, and an international best-seller among personal development books.

Its approach is simple: *“let the past die at every instant. You don’t need it any more. Become totally present, and the past loses its power. Presence is key. The present is too.”*

For Eckhart Tolle, the solution for ending the suffering of the human condition is to break away from dwelling on and idealizing the past, and also from imagining situations, people, and so on, in the future.

Living this way means living without illusion, in the positive sense of the term, so you can fully invest in the present moment.

Note that its translation in France, *“Mettre en pratique le pouvoir du moment présent,”* is already present in the Top 15⁴⁵ in the category *“Marché du pratique”* (“How to” market).

.Transpose these precepts to a society, and they relativize everything that constitute that society: guilt, disappointment, frustration, conflict, demand for external solutions, etc., in favor of “here and now” actions.

This also explains why the French, and others, no longer have any confidence in political bodies and have no desire to make a personal effort to get out of the crisis.

They want to forget their four key stressors: globalization, the future, the present, how to manage all that.

In 2011, four antidotes brought structural answers that can be combined for even greater efficacy: the local, nostalgia, escape, coaches.

The food market is a creative demonstration of this, juggling between location,

⁴⁴ Eckhart Tolle, *J’ai lu*.

⁴⁵ *Panel Livres Ipsos 2011*

traceability, with a photograph of the producer (in Normandy or Brazil), date of the brand's creation, authentic names, medals, references to the past...

A combination of all these symbols responds to the fear of products that are anonymous, standard, industrial in the bad sense of the term, with no fixed origin. And above all, it makes the consumer forget the price, since he's so happy at the prospect of a return to authentic things, good taste, the very best.

Bank advertising has adapted these trends. For example, the *Crédit Mutuel* which shows two attitudes, the traditional distrust of an anonymous banker, with decisions made from afar and in the upper echelons, and the serenity of a young client, member of a credit union, and who knows that things happen in his region, in Clermont-Ferrand.

In 2012, nostalgia has aged and become standardized in marketing strategies.

In the cinema world, the landscape is breaking up into two major categories: escape still works, but the touchy-feely is competing with it, adopting the rationale of the previous year.

On the one hand, the spectacular, the fantastic, science-fiction, with "*Twilight IV*," "*The Immortals*," "*The Secret of the Unicorn*," "*Time Out*," "*Mission Impossible⁴*," etc., to escape the present and lose oneself in extraordinary, superhuman, limitless worlds.

On the other, "*The Intouchables*," "*Polisse*," "*The Snows of Kilimandjaro*," which portray scenes of everyday life, ordinary or hard, but that are transformed by events, interpersonal relations and unexpected emotions, bringing magic back into those lives. More than 15 million viewers for the first film in the list, more than 3 million for the second, they have no complexes about rivaling the first family, which is more box office savvy.

INTERVIEW Marie-Laure Lerolle, Michèle Pollier, Ipsos MediaCT

Tell me what you read, and I'll tell you who you are! An interpretation that is disappearing, with no regrets. For years, readers – male and female – have felt obliged to lie about their tastes. Take the audience surveys which might suggest that the cultural channel Arte is the leading channel in France. That attitude is changing, notably with the new generations, who don't hide the fact that they like to have fun with friends, they like spicy news, sexy photos, luxury, dreams, etc.

Pure pleasure in the moment, free of guilt, like an anti-routine valve?

Marie-Laure Lerolle – *It's wrong to say that young people are deserting the women's press: readers face constraints in their lives, transport, time, money, and they expect magazines to bring them escape, a chance to breathe. Magazines have become consumption treats like a soft-drink! We have no guilt in buying a consumer product and we can throw it away or pass it on afterwards.*

Michelle Pollier – *The incidental pleasure purchase is very common among the youngest people, according to the time available or to be occupied, an impulse at a newsstand for a headline, a subject, an ambiance. They choose between publications that are their "favorites," or new things, or special offers, they prioritize access to content and not the status of a publication. The reading experience is replacing the reading contract, with no regrets.*

Marie-Laure Lerolle – *The cover promises pleasure or appeals to them, it's like a web page on the Internet; the reader will zap through two or three pieces of information inside. Consumption modes are superimposed and increasingly impulsive. These changes in consumption are impacting magazines, which must perpetually adapt to the tastes of the day, meaning formulas wear out faster. It's a perpetual facelift.*

Michelle Pollier – *Only the oldest people still display the publications they read like a visiting card, and of course the "what I read says what I am" may linger for magazines focused on particular interests, for readers who see themselves as a community, or even an activist community. But otherwise, the younger generations reason in terms of personalizable "baskets" of sources and media, consumed according to their own pace of life, circumstances, and mood.*

Marie-Laure Lerolle – *Deciphering is the second major trend in fact. The need to understand is the answer to the flow of information, the repetition of subjects that are freely accessible, on TV, on the radio, etc. The public can cope with reading Paris Match, Oops, Closer, Gala, Point de Vue, etc., without stressing out about what others will think. They don't identify with what they read: that's the big differences between young*

generations and the others. It doesn't cost much, you can easily alternate; you can juggle around with subscriptions: people are willing to miss an edition for two or three months to pay less elsewhere. That kind of opportunism has no regrets!

In the end, the need for alibis has disappeared.

Michelle Pollier – *Readers, and here again the young generations in particular, don't feel obliged to read, and even less obliged to read everything. Either a publication and/or a photo speaks to them intuitively and tells them a story... that they don't already know..., or they zap. "I don't have to read a whole article to understand what they're trying to tell me," is a phrase often heard in groups. Yet readers, increasingly information-producers themselves, are more sensitive to codes, criticism and more demanding in relation to editing... It's clear that when they don't read certain articles, they have no regrets because there's nothing to regret: we simply don't know how to speak to them. Alibis make sense for reading matter that people aren't comfortable with, but the trend is for people to be comfortable with their reading matter, with no obligation to consume everything, but for the pleasure of making the most of the best and if the best is too diluted, the connection loosens or the experience is not repeated.*

[Consequences]

[Strategies for the next installment]

Do you have to be normal?

In Italy, consumers tend to reject brands whose advertising codes are still too luxurious with regard to the crisis, and out of step with their market: *Ferrari* and *Lamborghini*, top models and Palladian villas are viewed as outrageous or even provocative for a flour brand.

Likewise, after the admiration for and macho complicity with Silvio Berlusconi, the “Rubygate” trial (with Berlusconi accused of underage prostitution and abuse of power), damaged his authority and the idea of a change of government was publicly talked about in Italy, with even greater virulence when his defeat in Milan⁴⁶ seemed like a disdainful affront.

Which didn’t prevent the President of the Council from bouncing back, winning the crucial confidence vote in the House of Representatives and being found innocent in the Mediatrade⁴⁷ affair, before his (temporary) elimination from Italian political life a few weeks later, due to a lack of confidence on the part of the markets.

In France, François Hollande wants to position himself as the candidate of the return to normal, against Nicolas Sarkozy, who is supposed to embody excess and bling-bling.

During the Socialist Party Primaries, he thus claimed to be *“a normal candidate staying in touch with the country,”* as if Nicolas Sarkozy had clouded the codes and the conventional practice of the presidential function.

For him, *“a normal president is what we’ve been lacking since 2007,” “what we’ve been experiencing since 2007 is not normal,”* because a *“normal president is one who is capable of giving confidence, therefore of showing coherence and consistency.”*

It remains to be shown in what way **“Nicolas Sarkozy was an abnormal president”** and why the transgression time is over.

Needless to say, Martine Aubry didn’t miss this opportunity to explain that *“when you want to be a candidate to the presidency of the Republic, you have to have a bit more”*... and likewise Nicolas Sarkozy: *“Mr. Hollande is making a huge mistake by thinking that the French want a normal president, because not one French person*

⁴⁶ First election of a left-wing mayor in twenty years

⁴⁷ Silvio Berlusconi was suspected of tax fraud

thinks that this is a normal post.”

This is a strategic point in terms of achieving the result: for some, normality is the condition for it, for others, on the contrary it is the capacity to be ab-normal, in other words different, out of the ordinary.

How can you be normal without being ordinary? How can you be charismatic, when this is a condition for generating public enthusiasm?

The advocates of normality explain that modesty is the counterpoint to promises not kept and hopes disappointed.

After a long emphatic sequence, the French seem to have accepted the idea that there is no superman, extraordinary hero or heaven-sent individual able, by himself, to reform the problems and return the country to progress.

Louis XIV, Napoléon, De Gaulle, are all dead and they have not been reincarnated for 2012; in their absence, is it the normal man who has the capacity to inspire confidence because he is an ordinary alter ego, because he projects to the electorate the reassuring image of a double, because his ordinariness cannot conceal a Prince of lies?

On television, the success of *“Un dîner presque parfait”* against *“Top Chef”* may be as symbolic of this transformation: on the one hand, the search for perfection with an uncompromising jury of professionals (two chefs: Frédéric Anton / Le Pré Catelan and Yves Camdeborde / Le Comptoir du Relais Saint-Germain, and the gastronomic critic Sébastien Demorand) praising or sanctioning amateur cooks. Tough and devaluing, because it is difficult to identify with demoralized losers.

On the other, five candidates living in the same city invite the four others to dinner, each one in turn receiving a mark for ambiance, coordination, quality and originality of the cooking, and the decorative aspects of the table and the dishes.

It is more likeable and projective in theory, because it is easier to imagine oneself in the place of the host or guests, doing their best.

INTERVIEW Sylvie Gassmann, Ipsos ASI

Where are brands today?

Analyses of advertising taglines show that brands are all about re-invention, reformulation, redefinition. Hence, ING offers the chance to change banking air while the Caisse d'Épargne redefines the profession of banker using the strong symbol of the white page, signifying that everything must be reinvented. Renault proposes changing car for a new life, while Hyundai signs its advertisements with the explicit slogan: New thinking, new possibilities... You get the impression that in 2011, brands assigned themselves the task of re-inventing the rules of the game, to be more in line with the expectations of the consumers of the future; brands are more service-oriented, they stick up for the client and become his allies in fighting the dictatorship of markets, against the rules of the past, against the old brands. They are a stakeholder in change and are by your side in entering into the world afterwards. Citroën's new campaign is also revealing; to launch its DS4, it's setting a challenge: "have you already tried to say no?" It makes analogies about everything we have the right to say no to now, to obviously say yes to a new car era, thanks to the DS4.

With no regrets about reinventing, reformulating, recreating, redefining and, why not, rebirthing, in other words not the "re" of visiting the past, but the "re" of change, tossing everything in the trash and starting over. In 2010, there was much talk of nostalgia, vintage, we revisited the past, and perhaps we're in the process of understanding that that's a dead end, because visiting the past over and over doesn't bring creation.

Indeed nostalgia, revival is a negation of creation. Using the advertising past of a brand, however glorious it may be, to re-launch communications is a solution that serves to conceal its loss of inspiration, and that tactic is short-lived; being anchored in the past makes it difficult to project into the future, at a time when brands need to be speedboats and not steamships. The speedboat brands, the stars if you like, are propelling themselves into the future, that country where it's possible to invent once again.

Let's not forget that turning to the future, with no regrets, is made possible by progress; and this technical and technological progress was highlighted throughout 2011. Firstly by the State through its big modernization campaign, but also by other public players who have incited us to enter into the world afterwards, such as the French Environment and Energy Management Agency, the Ademe, or to write the future, like Areva in the nuclear field: "energy is a story that is still being written. Let's keep writing it with less CO2." Private brands also want to be a part of this regret-free movement towards progress. LG for example, which presents its new Optimus Black model with the tagline: "A new era has begun." Or Toyota stating that "the silent revolution is underway." It's

important to understand that this progress is magnified, enhanced by brands, which find in it an ally in restoring desire, bringing magic back to consumption.

Exactly, isn't there a trend to be "re-inspired" by the desire for the future?

Yes absolutely, and taking 15-24-year-olds for example, it's very strong among the younger generation, that doesn't mean there aren't any dark areas and very pessimistic feelings, but when you get them talking about subjects of technical and technological progress, then you start hearing ambition, enthusiasm again, and the outline of a more positive future, whether in relation to ecology, for cars (Toyota tells us: "the silent revolution is underway"), or of course the virtual world. In this respect, brands are playing their role: drawing inspiration from technological and environmental progress, to outline a better future in which the brands in question will of course have their place.

The French are increasingly resigned, has the "indigné" mindset dissipated...?

... These notions are obviously absent from the vocabulary brands use and it would be an aberration otherwise, they know that their role is to bring magic back to consumption in any case, so they're taking the positive aspect of the future, and one of the positive aspects is still, among the younger generations, a real belief in what progress can bring from a technological point of view.

Just consider the totally over-the-top success of any new Apple product. Every time a new iPhone comes out – whereas a little clear-headedness tells us that it will be a 5% improvement on the last one – it exerts total appeal, 15-24-year-olds go on YouTube to listen to Steve Jobs' (RIP) press conferences, to hear a boss talk about his new product and there's no detachment there because from this point of view, fascination works. Unlike the fact of going to the moon which can make us fantasize in a very abstract way... These technological novelties, the smartphones for example, change your everyday life, and that's where progress starts carrying positive values.

Brands believe in this communications route: being part of progress to carve out a better future for oneself.

Do we tell ourselves "that's the past, let's start over"?

There's no need to even say it, when Toyota declares "the silent revolution is underway," it doesn't need to remind us that cars used to be noisy and we could hear the noise outside. Brands are focused on the new services provided to consumers by progress. They no longer refer to "before," they are clearly projecting into the future. We all know that brands can no longer present a discourse of authority in relation to consumers, those days are clearly over. So it's more commercial to offer more services, more proximity, "the brand is alongside the consumer to help him enter into the world afterwards."

Lastly, what better symbol than childhood for turning towards the future, with no regrets. Children have frequently appeared in ads for brands that are not meant for them. Two evocative examples: Crédit Agricole, which gives a voice to the dreams and desires of children, providing a new illustration of their good sense, and the wonderful launch film for the new Passat, with a larger-than-life mini-Darth Vader and a powerful tagline in the French version: “Born of future ideas.”

We’re turning the page and moving on. It makes you wonder if brands aren’t doing what politicians no longer do; forgetting the authoritarian discourse, the commands and imperatives and bringing magic back to the future, giving people something to dream about, imagine, restoring desire.

Questions of style

France wants to move on, which explains the gap between those who continue in the same old way, and those who are elsewhere.

The gap between the ironic view of public opinion and the face-value stance of the Authorities is one major explanation.

When opinion is rooted in irony, satire, provocative subversion, the disqualification of the powers-that-be and de-socialization, when this sardonic attitude is a means to increase self-esteem, then the powers-that-be are going against the flow.

Irony is a key to success in the audiovisual and advertising worlds, self-mockery is almost the rule; despite that, **“seriousness”** is still the dominant code of isolation: candidates, company heads, spokespersons.

They think that their gravity will recreate connection and confidence, and that the codes and images that they want to project will work.

As before, they feel obliged to feature on page one, to write a book to get themselves known, talk about themselves, their lives, their story, their convictions, their program when they are candidates to the Presidency of the Republic.

The public just sees this as a familiarity strategy; the very opposite of **“not seen, not taken.”** Seen, taken, zapped. Martine Aubry’s score has not improved, despite her presence in the famous weekly *Paris-Match*: no impact from the photos, and no influence from the words, for the woman whose candidacy is **“normal.”**

On August 20th, Ségolène Royal published her book **“Lettre à tous les résignés et aux indignés qui veulent des solutions”** (“Letter to all those Resigned and Indignant who want Solutions,” published by Plon): success in the bookstore doesn’t equate with electoral success.

On the 25th, François Hollande published **“Le rêve français”** (“The French Dream” - Editions Privat) with, according to the AFP press release: **“his ambition for French men and women, his deepest convictions, his demand for justice, his lofty and worthy conception of republican citizenship.”**

But can one be normal and make people dream? And while evoking the need to **“give meaning to austerity,”** with a plan for 50 billion euros in savings.

It’s not easy either to appeal with a slogan like **“In 2012, not everything will be**

possible,” leading to François Hollande’s call to “*restore magic to the French dream,*” whereas the French feel that the threats are becoming more precise and more concrete.

The French don’t expect dreams, but rather facts:

- Socialist party supporters want a new watchword: “*justice*” and equity after the divisive sequences implemented by Nicolas Sarkozy.
- The others view the formula as purely rhetorical at best, at worst worn-out and mollifying, considering the personality and charisma of the person expressing it.

Critics of normality may feel supported by the current emergence strategies, successes and preferences in the marketing, culture or advertising fields.

Those who affirm their uniqueness most powerfully, who promise the least normal experience possible, or the most fantastic show possible, are the ones touching base with the public.

Stars like *Amy Winehouse*⁴⁸ or *Nicki Minaj* display the demand for stars who break the mold.

Nicki Minaj’s album, released in late November 2010, went platinum in the USA six weeks later, with one million records. The number one seller, it beat *Kanye West*, *Eminem*, *Katy Perry*, *The Black Eyed Peas*, *Rihanna* or *Justin Bieber*, none of whom can be claimed to embody absolute normality...

At the movies, the super-heroes are back, the ones we thought dead after 9/11 and the collapse of the Great American Myth of super-power, as shown by “*The Green Lantern.*” “*The Amazing Spider-Man,*” “*Captain America: First Avenger,*” “*Conan*”...

The psychotropic worlds of *Orangina*, with its bear or its giraffe, or of *Oasis*, *Fanta*, etc. show that anything that bores people tends to be assimilated with “*average,*” with all the risks that come with that: routine, standardization, ordinariness, no desire and no future.

The fabulous and the dream are still rituals that unite, phenomena of collective emotion; on French TV alone, the wedding of *Kate Middleton* and *Prince William* on Friday April 30th (broadcast live on TF1, France 2 and M6) represented 78.5% of the audience share and was even summarized on W9 (1.33 million viewers at 8:40 pm).

⁴⁸ Amy Winehouse joined the “*27 Club,*” on July 23rd 2011. This club includes artists who died at age 27: Kurt Cobain, Jimi Hendrix, Brian Jones, Janis Joplin, Robert Johnson, Jim Morrison, Alan Wilson.

A few weeks later, in July, the wedding of *Charlène Wittstock* and Prince *Albert of Monaco* drew 7 million viewers, with France 2 once again leading the audience ratings with over 33.5% (4.2 million viewers) as opposed to 23.3% for TF1 (2.9 million).

These personalities operate as projective surfaces: everyone can imagine and dream of being in their place, in a moment of heroic splendor and charisma, to forget all those obligations, routines and boredom.

“Extraordinary” events are better at uniting people. Take for example, the Solidays, Rock en Seine, the 128,000 tickets sold at the Festival d’Avignon for an occupancy rate of 93%, the 67,000 viewers who watched the Muziks à Manosque festival.

In such conditions, how can one cope with being to the political offer what the private label is to marketing? How can energy be restored to ordinary France?

How do you make people dream, how do you unite them around a **“soft image,”** as Dali would say? Being normal means being who?

For the SyFy⁴⁹ channel, dedicated to Fantasy and Science-fiction, it’s the very opposite, as its tagline in France shows, **“c’est être anormal qui est normal”... (It’s being abnormal that is normal).**

⁴⁹ NBC Universal Global Networks.

INTERVIEW Marie-Odile Duflo, Ipsos ASI

We get the impression that society is undergoing a profound change. In what context are we living right now?

We're currently in a society in which the words that accompany us and resonate with us day to day are: crisis, dead-end, austerity, uncertainty, decline, "no future," whether that future is political or not. And in the middle of all that, we have an individual who has to take his future in hand, a person who is switching from hyper-individuality (which was a sort of model over the last few years, especially in tune with hyper-technology...) to a strong realization of this social reality.

Individuals, people, consumers, have taken note of that reality. And in reaction, they have decided to live in the present moment, their own moment. But they're also laying claim to the right to be versatile in their opinions: if what corresponded to a need yesterday no longer suits them today, well, no big deal, you change your mind to accommodate another immediate need.

So we're in the instant society, the society of "here and now," of "right away," where each individual makes the choices that concern him in the moment. And then lives with them. Even if it means changing a moment later.

Observe the younger generation, whose future is cloudy, not to say dark, even for those graduating with 5 years of higher education after their baccalaureate (for the first time, 40% of graduates from the HEC business school did not find work on leaving their school). And so we're noticing how these young people are creating their own system of freedom. A freedom which, from my point of view, goes via the virtual, the Internet, cyberspace, etc. Which enables them to communicate, to create their own spaces, escaping any risk of judgment or censorship from institutions or adults.

In other words, these young people are entering into a society which, because politicians cannot provide them (us) with the vision of a new economic, political or societal model, has become a getting-by society. As a result, young people have started to play with that system, the way they play with their video games and technological accessories. They're inventing their own model. A model, I would repeat, that they will reject if it no longer convinces or amuses them.

Faced with these new challenges, brands will need to free themselves from the single product or pure advertising. They will need to offer a broader experience in order to extend their legitimacy and their interest, developing new communications approaches that are more conversational (the web and social networks are the players in this), more engaging in order to create a strong bond with this new type of consumer who is fiercely individualistic and extremely versatile.

This change, this realization, are they perceptible in the communications world?

For me, the communications world in the broad sense has already taken note of this new societal context and that's leading to the emergence of some interesting phenomena and a glimpse of certain trends, in any case in the cultural or communications worlds.

*Echoing this realization on a societal level, advertising is increasingly showing people the way they are, **real** people, living a **real** life, in tune with **real** reality, and no longer a dreamed-up, inaccessible, glorified form of reality. We're far from the bling-bling of the Sarkozy years!*

This phenomenon can also be observed in literature, at the movies, or on TV. Take the novel "Delicacy" by David Foenkinos: more than 800,000 copies sold for a very simple story that highlights inter-generational respect, tact, attention, good manners, refinement, a touch of humor (light years away from the DSK saga!)

The same trend appears in the cinema with (French, incidentally) films such as "Declaration of War," "Polisse" and of course the "Intouchables" phenomenon (580,000 tickets sold on November 11th alone, more than 15 million viewers to date). These three films place the human element at the very core of their stories, yet those stories are very different. A real humanity, not obvious at first glance: handicap, illness, rape, yet all carried by hope, generosity, intelligence, laughter too sometimes.

On television, we're seeing the same thing. The program "Rendez-vous en Terres inconnues" on France 2 was also popular with viewers. The aim here is to confront personalities with the real life of authentic tribes at the other end of the world. And through the "civilization shock," a genuine emotional shock is created.

And the success of all these creations tells us just one thing: the connection with other people is important today, it is essential to live in the present moment because happiness is in the present moment.

And in advertising?

In advertising, we find the same development. The last billboard campaign by the RATP (Paris public transportation authority) plays on this loss of values by focusing its advertising on the theme of incivility, and the issue couldn't be more real! Using a "human bestiary" – a frog jumping over a turnstile, a bull pushing past other passengers – the RATP presses where it hurts and makes some citizens think about their own behavior and the image they are conveying of themselves to other passengers. A very clever way of making people think and become aware, even if we know that a change of attitude won't happen in a day.

Advertising has also spotlighted teens, never hesitating to show them with their quirks,

their aggressiveness, their verbal violence. Hence the SFR NeufBox ad draws inspiration from familiar scenes: the young girl having a fit because she can't have her favorite jeans, and the alarmed parents unwilling to tell her that the Internet is down too!

Universal Mobile portrayed teens dealing with adult situations that are too much for them to take (parents making love in the caravan, forced dinner with elderly people) and the teen comes out fine because the "plan is blocked, but I'll never be!" The teen turns up again, playing against type this time, in the "Renault Shop" ad, where a tall, lanky, long-haired kid is making spaghetti while the parents are glued to the Internet and refuse to come to the table. The world upside-down!

The family and its relations, often controversial or difficult, are currently a focal point in advertising. Proof that this aspect of life is not just a creative setting, but a real reality and a source of inspiration for advertisers in producing advertising for their clients. In a word: life the way it's really lived is being highlighted.

You want more? I could quote McDonald's which was a forerunner with its prizewinning "Come as you are" campaigns. Or the recent banking ads, placing the individual at the heart of the campaign: the BNP, a model for this genre: "You have real questions, today one bank gives you real answers." Or BforBank: "My banker is me." And the Crédit Agricole, or the Crédit Mutuel. The fact that all these banks felt, at the same time, the need to communicate differently, in a more real way, proves that this need for authenticity is a real ground swell.

On the telecom side, same observation. Whether it's Bouygues Télécom with "B You" saying "You have the power," or SFR stating "We start with you and that changes everything."

And the food brands aren't being left behind. Take the new Kellogg's ad, which rather narcissistically highlights the relationship with the body, but in terms of the development of a woman's life and how she responds: "Special K: to help you be who you want to be, love yourself."

And what can we say about the remarkable Contrex film with its tagline "We'd lose weight better if it was more fun"? It runs totally counter to the diet notion, it's a clever and humorous way of addressing women while touching upon a reality they are all familiar with: dieting is restrictive, it isn't fun, we're fed up with it. Drink Contrex, bike, do something different, stop thinking about it, have fun while losing weight. In the film, as the women pedal and use energy, they reveal a striptease by a hunky male (in neon pink!). It created a huge buzz on the Internet and is among the most widely shared viral films.

These few examples show that we have entered lastingly into the era of ego-marketing. We're touched by the authenticity of situations, people are touched in terms of who they

are and what goes on around them. We're in a context in which the human element and the social bond are at the very heart of things.

Does that mean brands need to call themselves in question?

The brands that are established, that are content with talking about their product, that merely show the material nature of what one should own, are out of step today. In contrast, the brands doing well are the empowerment brands which give people confidence. The intelligence of those brands lies in placing the individual in the center of the relationship. And the individual, as we have seen, changes day to day, is rooted in the moment. So the brand has to create that confidence, it has to be available, it has to convey values that will resonate with the individual-consumer. The way I see it, that's a big change in today's values: some brands will increasingly enter into a conversation with the consumer. The values highlighted, how true the brand is felt to be, the simplicity and uniqueness of the messages communicated and the emotional connection created will be at the center of brand/individual relations. So that the individual will say: "I can relate to that stance, I like the values being put forward, this brand sees me as an individual, and what's more, there's a product that corresponds to my immediate need, in short, this brand totally corresponds to me."

And what can Ipsos ASI highlight?

Until now, brands have reasoned a lot in terms of a race for innovation, race for products, product differences, etc. So they have lost sight of or minimized support for brand capital, or the brand's essence, its vision, its values.

If brands want to maintain this relationship with the individual-consumer, first they have to go much further back into the personality of the brand, into its DNA, and work across the board so that it can then deliver messages on all the contact points that it will put into action.

Ipsos ASI has obvious legitimacy and real expertise in helping brands to develop brand communications platforms, or pinpointing the key message of a communications campaign.

[Friction zones]

In 2007, Ikea's slogan was *"Store,"* Ségolène Royal wanted *"correct order,"* Nicolas Sarkozy wished *"to re-establish authority."*

That convergence between the various actors in society no longer exists in 2012.

Ikea's advertising highlights the words *"Make the most,"* François Hollande wants to *"restore magic to the French dream,"* Nicolas Sarkozy wishes to *"protect the French."*

These programs and the relations they bring with them are very different:

1. Live and don't ask questions.
2. Give yourself the means to live an ideal.
3. Leave it to an authority to ensure you live optimally.

1 and 3 can co-exist, if 3 is the condition for 1. On the other hand, if protection comes with restrictions, rejection will come fast. The same applies if the dream turns to illusion and the return to reality takes place under the banner of austerity.

The effects of international situations (Syria, Iran, Russia, China) and the local context (France losing its triple A, growth, unemployment, "man bites dog" stories) have accelerated the shift in cursors, between denial and dramatization, making preference for 1 and 3 even more unstable.

So, soft command or just a command?

An example with the *RATP*, to remind users of simple rules: pay for your tickets, stand up during rush hours, let people get out before you get in, throw your chewing-gum in the trash can, talk quietly on the phone, etc.

Instead of listing the corresponding penalties, its advertising campaign shows animal characters who are meant to devalue the people who transgress: a frog, a sloth, a buffalo, a lama, a chicken... And the whole thing comes with a little moral tale⁵⁰ designed to re-socialize people with basic behaviors⁵¹.

⁵⁰ "He who jumps over a turnstile! May fall upon a platform inspection."

⁵¹ No one would have imagined that they would be the subject of a specific advertisement and a website: www.chervoisindetransport.fr

You just have to take the metro to appreciate the actual results and measure the impact of this strategy. First, no one has changed behavior. Second, the contrast between the reality of public transportation and the ads has inspired some creative parodies using other images (livestock, sardines, etc.) and other moral tales: *“He who pays for a transport ticket / Has the right to travel in comfort,” “Let’s stay tight all down the line.”*

Other examples, with the requalification of the orgies held by DSH and friends as *“parties-fines” (swinger parties)*, a deliciously outdated term in French, or a rape as a *“bousculade,” (jostle)*, a delicate euphemism that is rather far from reality⁵².

In contrast, in other areas, a clear direction is expected, according to customers of banks or insurance companies. Freedom of choice is often viewed as indecision or disengagement at the very time when a consultant should be displaying his expertise. Within a context of doubts about banks, their reliability or their resources, this attitude amplifies more general fears and feeds into defiance.

A soft approach in the name of a respect for the customer’s decision-making autonomy can, once again, be counter-productive, when we want something much more than suggestions from a consultant.

Irony in one case, dissatisfaction in the other, two answers that give *“Make the most”* all its density: living in the moment, with no scruples or illusions, but with pleasure.

[And the winner is?]

Abstention or tactical vote...

The French have taken a step back from all the institutions to focus on their own resources, with 48% claiming that they mainly trust themselves to avoid the onset of a new financial and economic crisis.

They have expressed their irony shamelessly: in October 2011, 46% stated that they have confidence in Angela Merkel and the German government’s ability to resolve the crisis, as opposed to 33% for Nicolas Sarkozy.

⁵² Agnès Marin, aged 13, was raped killed and burned by a classmate and repeat offender aged 17. In reaction to this crime and the debate on the lack of follow-up, François Fillon brought Michel Mercier (Minister of Justice), Claude Guéant (Interior) and Luc Chatel (Education) together to legalize a new law on evaluating the dangerousness of delinquents.

They are withdrawing from the game with no regrets, with abstention as the end-result of **“Couldn’t Care Less”** in politics, with the consequence being a total lack of legitimacy for elected politicians.

Abandonment also made its stage entrance, with 29% of French people claiming to be **“resigned”** about the crisis, inciting them not to rally or to opt for traditional candidates; as for the **“Indignés,”** they have tended towards the protectionist fronts.

Unless the “tactical vote” takes over, with the obsessive fear of April 21st (first round of the election) operating as a foil and leading to extra-participation.

Nicolas Sarkozy or not...

2012 is more a referendum for or against Nicolas Sarkozy than a classic presidential election.

The tension between temptation to vote for Nicolas Sarkozy and desire to turn the page has been expressed through a stabilization in opinion polls and his gradual return to an upward trend, while 2/3 of French people do not want him to be re-elected in 2012, with a very clear lack of support among young people (almost 80% of under-35s do not want his re-election) and those with the highest levels of education (72%).

From June and July 2011, the elements likely to positively crystallize in Sarkozy’s favor were coming together: seriousness, gravity, sense of responsibility, expressing his mastery of the management of power, and modesty, proximity, attentiveness, signifying a more authentic relationship with the French, a determination to adopt a position on the subjects that concern them, such as the French military presence in Afghanistan or the euro crisis.

His management of the Europe situation and the Greek debt, his involvement in two Brussels summits have convinced the French that **“had there not been an agreement, it isn’t just Europe that would have gone down, it’s the whole world.”**

The context has favored Nicolas Sarkozy: he has become the person he should have been – in the popular imagination – from September 2007: measured, soothed, confident in France’s resources. He has acquired three superior dimensions: the President who saved the purchasing power of the French, protected them from the collateral damage of the international crisis, ensured their safety and stability within an unpredictable and changing context.

He has changed, evolving towards greater personal and political maturity, as though he had understood that the French expected him to embody the presidential function in a

more traditional, in other words, more reassuring way.

He showed this in his October 27th interview, viewed as his symbolic return to the presidential campaign, with several effects: enhancing his presidential stature, situating the stakes for the future debate before the 2nd round in 2012, preparing other debriefs with regard to the crisis.

His TV appearances to explain the situation to the French people, his New Year's wishes, his entire campaign had the gravity and force required for his action to be evaluated.

He succeeded in dividing, with a reminder that the Left had made bad choices, polarized the stakes in the debate before the 2nd round in 2012, made the right observations.

His energy regenerated enthusiasm and activism and shook things up, notably among supporters of the centrist "MoDem" (Mouvement Démocratique) who preferred his proof-based discourse leaning on concrete examples, hence their swing between their original partisan preference and vote for Nicolas Sarkozy.

In the opposite camp, most of the occasions when François Hollande spoke out proved to be missed opportunities. His pussyfooting with Europe Ecologie Les Verts about the nuclear industry in mid-November was the first sign: a negotiation that was badly handled with an opponent theoretically weaker than the financial lobbies or international bodies at a time of defending French interests.

The socialist candidate has been unable to convince as to his capacity to lead the country, his potential to dominate during power struggles, his ability to win against opponents who are theoretically more powerful than him.

Nicolas Sarkozy thus gets reelected because he did the best he could, mobilized his camp and persuaded people that you shouldn't change commander in the midst of the storm, shown his talents both as an educator and a protector.

The French give him the time to *"finish the job"* through his second five-year term, and in an agitated context, from the reduction of the American debt rating⁵³, the threats of a negative picture of France after forecasts of scarcely a 1% growth in GDP in 2012, while the Moody's rating agency considered that *"certain major risk factors are out of control, such as the prospects for growth and the European debt crisis; the fiscal austerity measures are increasing tax pressure that is already high and could compromise growth, which could lead to a need for more fiscal austerity measures."* Risk, *"the French social model cannot be financed if the potential of the French economy is not preserved."* (November 21st).

⁵³ August 5th 2011.

At the end of his term of office, electors considered that France had crossed the turbulent zones that have multiplied in number since 2008 as best it could, that the President of the Republic is still the best captain until 2017, that with him, *“everything becomes possible again.”*

François Hollande or not...

At the outset, the Socialist Party Primaries were not perceived as a driving factor in the democratic debate, but rather as an episode shattered by the impossibility of Dominique Strauss-Kahn running.

The French people gradually took an interest and the TV debates beat audience rating records: 4.9 million viewers (22% market share) for *France Télévisions* on September 15th; 3.4 million for *i>Télé* on the 28th and 1.4 million for *BFM TV* on October 5th.

Meanwhile, the Presidency of the Senate moved to the left, with the election of the socialist senator Jean-Pierre Bel to its head.

The last debate between the two finalists on October 12th was watched by 5.9 million viewers.

2.7 million left-supporting electors voted in the first round and 2.9 million in the second: an exemplary democratic success for some, 4% of the electorate for others.

Next, François Hollande made the most of the context: the austerity measures did not go through, American growth⁵⁴ remained sluggish (+ 2.5% in annual rate from third to second quarter 2011), Greece pulled Europe with it as it fell.

Expressions such as *“France’s reduced rating,” “save Europe,” “the euro plays its destiny,” “Europe in pieces,” “Germany leader of Europe,” “a European government is needed,”* etc. have not helped restore confidence in the President of the Republic.

But even more than the International aspect, purchasing power and unemployment have been the major indicators of the failures of the purchasing power candidate of 2007, and the French have not forgiven Nicolas Sarkozy for not protecting them; the verdict is blunt.

From *“working more to earn more,”* to no longer working to earn nothing, the descent

⁵⁴ The first audit of the Fed has just been published and shows that the American Central Bank spent 16.115 billion dollars since 2008 in emergency loans to support the financial sector.

into hell has not stopped.

Today, including the overseas departments, France counts 4.459 million job-seekers with or without reduced activity.

With unemployment continuing to rise⁵⁵, the social fabric is weakening (including in the overseas territories and departments); with more than 42.2% of registered job-seekers receiving no benefits, the issue of balancing accounts will require new resources to keep the collective shock absorbers operating, in other words, new unpopular measures.

Purchasing power, employment, pensions: François Hollande has managed to provide appropriate answers to these three key public concerns.

His positioning, contrasting with the emblematic slogan and heroic model of the 2007 campaign, *“together, everything becomes possible”* corresponded to the demands for sobriety and moderation in public opinion.

He proved that the crisis had been transformed into an opportunistic pretext to present an artificial leader personality and denounced a pretense of control and a **“protective”** positioning.

The freeze on new hires affecting big industrial or financial symbols⁵⁶ and the announcement of a “short” recession in early 2012 called to mind the 2,500 downsizing plans of the 2008/2009 period and increased the impression of employee vulnerability and the powerlessness of Nicolas Sarkozy.

François Hollande also made progress in relation to all the items that were weakening him in late December⁵⁷, showing his credibility in terms of dynamism, presidential stature, capacity to make Europe work better, to confront the economic and financial crisis or make difficult decisions

The link between the current crisis and the historic one attributable to the Left has been perceived as an electioneering tactic by the Right, designed to disassociate it from its

⁵⁵ The unemployment rate in Metropolitan France was 9.2% in the fourth quarter, as opposed to 9.1% in the second. In the overseas departments and territories, in Reunion Island for example, unemployment went from 24.8% in 2008 to 29.5% in 2011.

⁵⁶ In late December, Peugeot PSA, Areva, Air France, Crédit Agricole, Société Générale, BNP-Paribas... announced major staff reductions.

⁵⁷ Wave 2 of the French Electoral Panel 2012 conducted by Ipsos for Le Monde, le Cevipof, Fondapol and Fondation Jean Jaurès.

own failures, with a surprising zapping of the 1995/2007 sequence...

Normality has prevailed, the anti-bling-bling has triumphed, the candidate to the Presidency of the Republic comes as close as possible to the last sentence in Sartre's *The Words*: *"if I put salvation away among the stage properties as impossible, what is left? A whole man, made of all men, worth all of them, and any one of them worth him."*

The "French dream" can begin again: François Hollande is the President of the recovery.

Marine Le Pen or the silent masses...

Protectionism has led the Front National to new heights.

Its plan, *"[apply] the principle of priority to the French in employment, housing and attribution of social benefits," "put an end to the French contribution to the European budget,"* has united all those who feel threatened by insecurity, unemployment, economic vulnerability, etc., or who feel their historic ethnoculture is menaced by immigration, the rise of Islam, the euro, globalization, outsourcing, etc. The silent masses have found their champion.

François Bayrou or the ricochet...

The dismemberment of Dominique Strauss-Kahn did not benefit the President of the Republic, likewise Jean-Louis Borloo's was not exploited by François Hollande.

In late 2011, the popularity of the third man of 2007 progressed, bringing him to the level of François Hollande who, meanwhile, was dropping among supporters of the Front de Gauche, Greens and the MoDem.

In contrast, although the positive current of the last few months has halted, Nicolas Sarkozy has managed to expand his support base with better scores among those close to the MoDem and the Front National.

Those tempted neither by Nicolas Sarkozy nor by the socialist candidate have found in François Bayrou the alternative solution to the two-party system: in December, he improved his score by fourteen points and ranked fourth in the political personality hit parade for France, behind Bertrand Delanoë, Christine Lagarde and Alain Juppé.

[And the winners are]

Difference

The normality challenge raises the issue of new products sent simultaneously to tens of millions of clients, along with the renewal of the mainstream and mass strategies.

In contrast, brands that are building differentiation and status are having no problem: *iPhone, iPad, Zadig & Voltaire, Abercrombie, Hermès, etc.*

This is an international trend: *BMW* increased by almost 16% (689,000 vehicles), *Audi* + 17.7% (652 000) and *Mercedes* + 9.8% (610,000). Within the BMW group, *Rolls Royce* experienced growth of 64% (1,592 units) and *Mini* 34% (142,000), in other words, when adding its brands together, an increase of over 19% in six months.

In the media, the globalization of content and its international distribution have been the subject of analyses, as in Frédéric Martel's book "*Mainstream, enquête sur cette culture qui plait à tout le monde*" (Flammarion) published in English as "*Mainstream.*"

He describes how the USA built its monopoly of "standardized diversity" using the crossover strategy, for example pop music, "black music made for white people," distributed by *MTV* since the 1980s.

Today it's India's turn with Bollywood, provided that its local representatives work hard to transform themselves into mass values; or the Brazilian telenovelas exported by *TV Globo* to Latin American and Central Europe.

While the new international geocultural frontiers are not too difficult to spot and explain, while strategies to seduce regional "pockets" (communities) can be dissected, it is much more complex, in France, to report on the keys to success among the silent masses, or their connections to the pockets.

Polls and market studies must get past a paradox: ethnic and community criteria are out of bounds if you want to explore pockets, sociodemographic criteria are outdated if you want to explore the masses.

New ways of describing the population, in order to understand it and anticipate, are thus needed fairly urgently, especially if an identification of weak signals is decisive in the trends of the future.

The home

The home has increasingly become an antidote to the obligations and risks that weigh on individuals; the house, the living environment offer expected escapes, as a chosen place for recharging and regenerating, against everything we're subjected to.

By pampering your house, personalizing it, each one of us can express our tastes and mark out our territory, stand out, protect ourselves.

Which explains the success of technological kitchen equipment and its accessories: Hi-tech and tea parties are key elements of comfort and pleasure, importing into our home a selection of content and objects that will relax, amuse, entertain, educate, and so on.

Flow time (outside) and slow time (inside) are complementary, because they provide different solutions to categories of need: speed, efficiency, performance, excitement or hedonism, sampling, contemplation.

The change of era

The current situation can be explained by a criss-crossing of phenomena that combine and feed each other's potential:

- The digital natives' access to consumption.
- The aging of the population with new needs.
- The critique of brands and advertising in general.
- Weariness with the would-be reassuring input from institutions.
- The general drop in purchasing power brought by austerity measures.
- The all-digital.
- The many consumption channels, from attic sale to the Internet via the Flag Store.
- New life models with divorces, families, ethnocultural changes.
- The ecological and international consequences of personal and local consumption.
- The transformation of product into service.
- Collaborative consumption⁵⁸.
- The desire for safe buys and handing down.
- The search for quality and authenticity.

All the actors in the consumer society must reflect simultaneously on this combining of values, attitudes, lifestyles, expectations, habits, notions: it is the characteristic, not of a

⁵⁸ Rachel Botsman, in her book *“What's Mine is Yours: the Rise of Collaborative Consumption,”* had mentioned this in 2010; it is now operating in France with a site like consocollaborative.com

crisis, but of a cultural and economic revolution.

The first tangible results: the end of “property” as an absolute, subscribing to possessions that last, group or on-demand purchases, billing by the hour or minute, sharing, renting, co-renting, carpooling, exchanging services⁵⁹.

The end of eternal regrets

In 1946, *“Eternal Regrets”* was the first Chinese film in color, so **“with no regrets”** for black and white. Same thing for a maximum of subjects in 2012, as long as the benefit of personal pleasure is guaranteed.

“Enjoy now” is the tagline that best corresponds to the mindset of the French people. Economic and social pessimism is a fact: managing purchasing power on a short leash is a reality. Nevertheless, should we give up on treating ourselves?

The answer is no, obviously.

The arrival of David Beckham at the Parisian soccer team PSG and of his family in Paris is revealing as to the tension between **“crisis” and “desire.”**

In a country threatened with recession, where public opinion is pessimistic and full of bitterness, one might have imagined that a soccer player earning the equivalent of 19 monthly minimum wages a day would have shocked the French, indeed left them “indignant.”

On the contrary, Victoria Beckham’s husband was welcomed with amused fascination, and public and tabloids alike are expecting new showbiz spectacles, sportsmen, people, trends to make 2012 shine. The PSG’s sports results will probably shift the cursor...

Those brands that understood that the pleasure of pleasing oneself had to be recreated, flaunting it to assert one’s tastes, desires, preferences, are sure to succeed: original colors in the automobile world, personalized equipment, high-tech, accessories, the small detail that makes you different, etc. The very latest smartphone and low-cost pasta, no problem.

The desire award goes to that which can be seen, that which expresses a status and enhances the owner; the rest can be hidden, or shared among family secrets, or be rewritten to nourish self-esteem.

⁵⁹ Example, the “Troc’heures” (“trade hours”) introduced by DIY superstore chain Castorama.

Logically, **“Feel good”** is the trend behind many successes, TV programs and drinks. For Bibiane Godfroid, Managing Director of Programs for M6, that’s the reason for the very good audience ratings for *“Scène de ménages”* and *“La France a un incroyable talent”*: *“It works because we’re in step with the times. We’re very feel-good. We’re there to laugh. I’m not the boss of Arte.”* To be continued, *“Patron incognito”⁶⁰*, *“La belle et ses princes presque charmants”⁶¹*, alongside *“Top Chef,” “Kitchen Nightmares,” “Le Chef en France avec Cyril Lignac”* and a *“Super Granny,”* after *“Super Nanny.”*

Same thing for *“Bref (“Anyway”)* the TV series with one million Facebook fans broadcast on Le Grand Journal on Canal+ and which varies the theme of the misadventures of “Je,” a thirty-something unemployed man who describes moments of his life in a voiceover: *“Anyway, I flirted with this girl,” “Anyway, I put everything off until tomorrow,” “Anyway, I play the guitar,” “Anyway, I saw a shrink,” “Anyway, I went to the supermarket,” “Anyway, I can’t say no...”*

The **“feel-good movie”** has become a genre in its own right and *“The Intouchables”* is its French incarnation, like Feel Good Still Juice Drinks, Feel Good Sparkling Drinks and Feel Good Juice Drinks for the The Feelgood Drinks Co.

For the critics and creators of the brand, a whole philosophy and lifestyle are expressed here, because *“the sensation of well-being is contagious and if you have one iota in you, you should absolutely spread it naturally around you. It’s easy to communicate well-being. The aim is to do a little something to make someone else laugh; the best thing in all this is that it becomes a win-win situation. You feel good, you do others good by propagating your well-being and you feel even better!”⁶².*

In the publishing world, *“Delicacy”* by David Foenkinos has never left the “top” list, as a **“book that does you good,”** to use the critics’ expression (they had the same comment for Marc Levy or Musso & Pancol), before its success in the cinema; because romanticism does you good?

In short, after procrastination, the theme for 2011, don’t put off until tomorrow but make the most of things, now.

This plan corresponds to a society that wants to get back into the present to move

⁶⁰ *“The boss of an SME goes back to the bottom rung of his company and realizes the everyday problems his employees face.”*

⁶¹ *A single woman meets boys with an unattractive physical appearance but a charming personality.”*

⁶² www.feelgooddrinks.co.uk

ahead, with no regrets, toward the future, as an increasing number of brands and public players are inviting it to do: *“Born of future ideas,” “A new era has begun,” “New thinking, new possibilities,” “Enter into the world afterwards,” “Live the momen⁶³.”*

A new challenge for advertising and politicians: how to move from nostalgia to progress, from egomaniac⁶⁴ to collective project, from expectation to action.

The answer can be found in Stendhal, in the chapter “Of the birth of love” (in *Of Love*).

In it, he invents an analogy between the process of idealizing the loved one and a decorative production technique: *“in the salt mines of Salzburg, they throw into the abandoned minshafts a tree branch that has lost its leaves in winter; two or three months later, they remove it covered with a deposit of crystals. What I mean by crystal deposit is a mental process that draws from everything that happens the discovery that the loved object has new perfections.”*

The first one to crystallize has won, whether it’s a brand, an advertising image, or a political personality.

⁶³ Advertising taglines for *LG Optimus black, Hyundai, VW Passat, Ademe, Harry Winston Rare Jewels of the World*.

⁶⁴ Joey Starr, Album: *Egomaniac*©, 2011.

[The Earth is round]

*Deep down I think the Earth is round
For one good reason...
After being around the world,
All you want is to be at home*

*I want to enjoy the people I love,
I want to take the time before time takes me and carries me away.
I have hundreds of things cooking,
But I'll do just what I want all the same.*

*The American rappers give the same advice as my parents,
Do what you want in your life but above all make money.
I tried to find a balance,
What's the point of preparing the future if you forget to live?*

*Today I feel good,
I wouldn't want to spoil everything, I'll put it all off until tomorrow.
There's really nothing I really need,
We'll see if I lose myself on the way.*

*Why do now what you can put off till later?
All we want is to enjoy the moment.
We're content in the light of the evening,
All we want is to be able to live now.
Why do now what you can put of till later?
All we want is to enjoy the moment.
We're content in the light of the evening,
All we want is to be able to live now.*

Words: Orelsan

Title: La terre est ronde

Album : La terre est ronde©

[Mandala]

Everything, or its opposite. The French have been freed from their captivities.

April 22nd and May 6th: election dates for the tenth French Presidential Election under the Fifth Republic, the ninth with direct universal suffrage.

Hollande is likeable but uninspiring;
Sarkozy is dynamic but his results are unimpressive;
Marine Le Pen, although de-demonized, remains worrying;
Bayrou is pleasant but alone;
Mélenchon is colorful but unthinkable;
Eva Joly is authentic but unbearable.

The 2012 candidates don't have exclusive rights to these contradictory tensions: they can be applied to all the actors in society today: brands, companies, advertisements, media...

From one extreme to the other, the citizen-consumer decides by the minute, is "having a ball," as though the crisis had enabled all forms of diffraction, all expressions of the offbeat .

As we await the great re-grouping?

*Words and music by Jean-Marc Lech & Yves Bardon
(December 24th 2011).*



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