

# FRANCE 2021 NOW OR NEVER



**IPSOS**  
FLAIR COLLECTION

**GAME CHANGERS**





The Covid pandemic revealed or accentuated several disparities and imbalances which are tearing apart French society. These will have to be addressed urgently.

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# 10 THINGS TO KNOW

## 1. PINING FOR THE “GOOD OLD DAYS”

A majority anticipate that their situation is (or will be) worse than their parents was at the same age.

## 2. FRENCH PEOPLE HAVE LITTLE TRUST IN EACH OTHER... AND EVEN LESS IN THE RULING ELITE

A majority (51%) believe that “the ruling elite make decisions which they know to be contrary to the interests of the majority”.

## 3. SAVING WHAT YOU HAVE, SPENDING WHAT YOU DON'T

The 20% most affluent households experienced a significant increase in their net wealth, while the 20% least affluent were more indebted by the end of the summer than they were before the pandemic.

## 4. LEARNING TO LIVE FROM THE SOFA

Covid-19 and lockdown has taught French consumers and marketers alike some clear lessons which might “stick” long after the pandemic. One of them being; laziness is good!

## 5. FRENCH BUSINESSES WERE CAUGHT OFF-GUARD BY REMOTE WORKING

Prior to the pandemic, 15% of those employed by small businesses were eligible for remote working but only 2% had plans to use collaborative digital solutions.

## 6. MONEY CAN'T BUY YOU LOVE

But 46% of the French public say it makes them happy, particularly in times of crisis.

## 7. LUXURY SHOPPERS RECOGNISE THEIR PRIVILEGE

However, they don't feel ashamed about it.

## 8. A DESIRE FOR DIGITAL HEALTH OPPORTUNITIES

Although it has historically been a weak spot in the local care offering, the French are now very open to preventive healthcare and telemedicine.

## 9. SHOPPERS DEMAND A SEAMLESS OMNICHANNEL EXPERIENCE

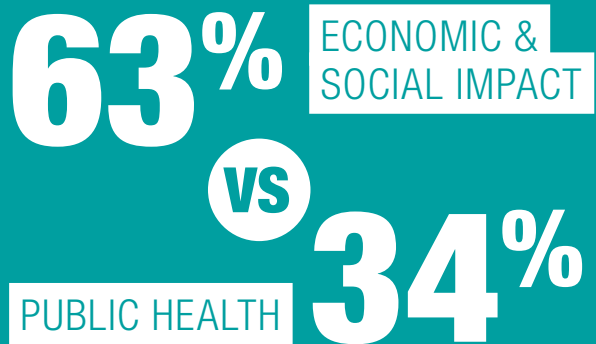
What really matters is the continuity of customer experience across channels and, ultimately, down to the final point of sale.

## 10. FRENCH BRANDS ARE READY TO TAKE A STAND

But they are sometimes a bit too reactive and awkward in doing so.



**79% OF THE FRENCH PUBLIC THINK THE COUNTRY IS HEADED IN THE WRONG DIRECTION, 21% ON THE RIGHT TRACK**



**France is more concerned about the economic and social impact of the virus than it's impact on public health**



**of French people consider the country's current economic situation to be bad**



**think the ruling elite make decisions they know to be contrary to the interests of the majority**

## PREDICTIONS

**53%**

**are optimistic 2021 will be better than 2020**

**69%**

**think people will still be wearing masks a year from now**

**16%**

**think life will have got back to normal in 2021 (the lowest of 31 markets surveyed)**

**43%**

**think the number of people living in big cities will decline in 2021**

## FLAIR FRANCE 2021 Q&A



### Yves Bardon

Ipsos Flair Programme Director,  
Ipsos Knowledge Centre

#### **Q How do the French feel about their country's situation in early 2021?**

**A** Just like 12 months ago, i.e. before Covid, 79% think that their country is off on the wrong track. What is even more striking, after such a terrible year, is that most of what we could say today about how the French see the state of their country could already have been said 15 years ago, when we launched the first edition of Flair in France (entitled *Merciless and Ungrateful*) with Jean-Marc Lech. Negativity is almost a constant in France. Two very temporary relief periods are an exception: 2007 and 2017, when disruptive new presidents were promising to usher in a new era, which never materialized...

#### **Q Is the prospect of mass vaccination against Covid in 2021 a potential game changer?**

**A** Not at all. From October to December 2020, the proportion willing to get vaccinated plummeted from 54% to 40%, making France the country least receptive to vaccination. Very few people think that the vaccine will have a deep impact on everyday life, since 69% predict that people will continue wearing a face mask in public.

#### **Q Why does this year's Flair say it is "now or never" for France?**

**A** The Covid pandemic revealed or accentuated several disparities and imbalances which are tearing apart French society. These will have to be addressed urgently. Covid also accelerated the transformation of business. Fewer than 30% of French retailers sell online versus more than 70% of the German.

It also points out that anticipation is needed in order to be able to cope with future crises in this world where nothing is unpredictable, but uncertainty applies to how, when and where the next crisis will happen: it could be related to public health, the economy, global warming, who knows? There is a strong feeling in France that the current situation is mostly the result of a total lack of planning, anticipation and preparation (e.g. with regard to face masks, lockdowns, vaccines, hospital capacities...).

#### **Q What are thus the priorities for France in 2021?**

**A** To find common ground for collective efforts:

- inclusiveness, proximity, security, connections, and empathy.
- Inclusiveness, because sensitivity to this issue is quite as exacerbated in France as it is e.g. in the US
- Proximity, because territorial inequalities and isolation increasingly make closeness to people and things one likes a luxury
- Security, because of uncertainty and a sense of doom which is quite pervasive
- Connections, because social connections have been strained and need to be repaired.

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## PINING FOR THE “GOOD OLD DAYS”



**Mathieu Doiret**  
Research Director,  
Ipsos Knowledge Centre

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**In our research, the French have always consistently expressed a level of pessimism far above the global average, even when compared with its culturally close European neighbours. In December 2020, France was once again among the bottom three most pessimistic countries in the world with 79% considering their country to be on the wrong track.**

In a survey conducted at the end of 2019, a majority of respondents anticipated that their situation would be worse than their parents' was at the same age in regard to quality of life in retirement (66%), job security (64%), purchasing power (58%) and protection from crime (51%).

Pessimism is such a fixture of the French mindset that you have to go all the way back to 1975, during the first recession in post-WWII France, when it wasn't present. Nearly half (48%) of the current population, including 61% of adults, were born before 1975.<sup>1</sup> This date is a beacon for a majority of the population and allows them to gauge to what extent the present situation can be considered better or worse than the “good old days” before 1975.

The fact that people are particularly concerned about their future pension is all the more striking as available data should

offer comfort instead of causing so much anxiety. In 1975, life expectancy at birth was 73 years<sup>2</sup> and retirement was not possible before age of 65. While in 2019, life expectancy had reached 80 for men and 86 for women. The average French citizen can now expect to spend 20 years in retirement.<sup>3</sup>

In 1975, France had 4.1 million pensioners for 13 million active wage earners, while until 2015 there were 13.6 million pensioners for 18 million wage earners.<sup>4</sup> In spite of this declining dependency ratio, pensioners have retained (and even increased) their purchasing power, with a replacement rate far above the OECD average.<sup>5</sup> Furthermore, and the legal retirement age has been lowered. The average net wealth of pensioner households is at a record high.<sup>6</sup>

So why are the French so pessimistic, especially the ones who are not due to retire until well into the future? The main reason seems to be that they've regularly been told for the past 45 years that the system should be fixed, and that this would entail a cut to their pension or require more efforts on their part (later retirement, more taxes). But, at the same time, very few drastic measures have been taken so far, leaving the reform of the pension system hanging like the Sword of Damocles above their heads.



# FRENCH PEOPLE HAVE LITTLE TRUST IN EACH OTHER... AND EVEN LESS IN THE RULING ELITE



**Brice Teinturier**  
Deputy Country Manager

**In January 2021, 55%  
said they would get the  
Covid-19 vaccine.**

**Ipsos/Sopra Steria has been surveying France every year since 2013 on behalf of Le Monde, CEVIPOF, Fondation Jean-Jaurès, and Institut Montaigne. This survey, named *French Faultlines*, has consistently demonstrated how pessimistic the average French outlook on the world is.**

Over three-quarters (78%) of French people think the country is in decline (up 9 pts. since President Macron's election in 2017) and more than a quarter (27%) think that this decline is irreversible (up 7 pts.).

The Covid-19 pandemic is France's number one concern (49%), followed by the cost of living (39%) and the future of welfare benefits (37%). People are actually more concerned about the economic and social impact of the virus than they are by its impact on public health (66% vs 34%). Almost half (45%) think the Government could have done more to support businesses - even though a record €470 billion of coronavirus relief funds for businesses has already been put on the table by the government.

Although 80% of the French public were in favour of the mandatory wearing of face masks, in January 2021 just over half (55%) said they would get the vaccine. Only Russia and South Africa had a lower desire to get vaccinated. However, 29% strongly agreed they would get the vaccine, up from 12% on the previous month.

The French public's structural lack of confidence in each other is evident in the fact that over three-quarters (78%) agree that *"one is never cautious enough when dealing with other people"* - a figure that hasn't changed in seven years. A majority (51%) consider that *"the ruling elite make decisions which they know to be contrary to the interests of the majority"*.

## SAVING WHAT YOU HAVE, SPENDING WHAT YOU DON'T



**Mathieu Doiret**  
Research Director,  
Ipsos Knowledge Centre

**70% of the total savings surplus was generated by only 20% of all households.**

**Lockdown's effect on household spending fed speculation of "pent-up demand" and a possible surge in post-Covid consumption. But this thinking often overlooked the income losses that lockdown had generated, the effects of which could last far beyond the end of the pandemic. Here's why.**

The French Government's Council of Economic Advisors (Conseil d'Analyse Economique, CAE) determined in a report published in October 2020 that there had been a huge surplus in total household savings during the second quarter of 2020, due to lockdown. It used data from bank accounts to estimate this amount at €50 billion.

The CAE was able to determine that this surplus had mostly remained in easy-access saving accounts and thus had little to do with investment projects. More importantly, it showed that the surplus was caused by a fall in spending by the most affluent, while, at the same time, the least affluent were actually tapping into their savings in order to cope with a shortage of income. The largest share by far of this surplus was generated by the money affluent households did not spend on entertainment, leisure and holidays. These "luxuries" account to €32 billion. 70% of the total savings surplus was generated by only 20% of all households.

While the 20% most affluent households experienced a significant increase in their net wealth, the 20% least affluent who already had a negative net worth (more debts than capital) became more indebted by the end of the summer than they were before the pandemic.

This happened after a decade of declining income growth. The loss of aggregated household revenue for the second quarter of 2020 was the largest in 20 years. Pressure on logistics and sourcing also contributed to a higher cost of living during the lockdown and total household consumption plummeted by 5.8% in Q1 and a record 11.5% in Q2. French households' aggregated discretionary spending power decreased for the first time since 2013.

It was hardly surprising that economic confidence should also fall, though it didn't hit as deep a rock bottom as it did in 2013, mostly down to government-paid income support. This leads us to another example of spending money one hasn't got: the state's budget deficit skyrocketed in 2020 from 3% to 11.3% of GDP and public debt reached 119.8% of GDP.

# LEARNING TO LIVE FROM THE SOFA



## Isabelle Fortin

Ipsos Global Activation Leader  
Innovation and Creative Excellence

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**Covid-19 and the subsequent lockdown has taught French consumers and marketers three lessons which might “stick” long after the pandemic is behind us.**

### LESSON 1: NO EFFORT

Why get up and about when everything can come to you in just one click? Zoom and MS Teams replaced business travel and dining out has increasingly been replaced by ordering food from a restaurant or click and collect from a pop-up - including even the most high-end eateries. For someone who lives near Geneva in the affluent part of Northern Savoy, Paul Bocuse's brasserie in Annecy, Irma, now sells hamburgers from a small chalet close to its locked down restaurant. Meanwhile, award-winning chef Jean Sulpice (L'Auberge du Père Bise in Talloires) is selling his signature dishes in supermarket Carrefour's catering aisle.

### LESSON 2: NO NONSENSE

Many brands were caught on the back foot when the virus hit and they tended to overplay the emotional message within their advertising. They spent much of the few seconds of consumers' attention thanking and congratulating “everyday heroes”. The first ones to do this gained viewers' empathy, but when all ads were playing the same tune, people soon started to get bored.

This is why research conducted by Ipsos soon showed that consumers expected something else from brands' messages. They wanted them to tackle concrete benefits, add value in a time of financial stress, and, most importantly, contain tangible evidence instead of nice speeches.

### LESSON 3: FULL AGILITY

With today's truth increasingly likely to be tomorrow's error, brands need to propose very agile solutions which help consumers easily adapt to an ever-changing environment and to cope with complexity and constraints. Complexity is now everywhere (particularly in policies and regulations affecting everyday life, e.g. vaccination), so every single simple thing that alleviates a burden is a major win and could earn its promoter a lasting reward.



# MONEY CAN'T BUY YOU LOVE... BUT 46% OF THE FRENCH PUBLIC SAY IT MAKES YOU HAPPY



**Yves Bardon**

Ipsos Flair Programme Director,  
Ipsos Knowledge Centre

## The rather materialistic approach to happiness brings France closer to Hungary, Russia or South Korea.

**Ipsos conducts its Global Happiness Survey<sup>8</sup> every year. This year's dramatic developments may have suggested gloomy results, but they turned out to be hardly different from 2019.**

With 78% happy citizens (-2 pts. vs. 2019), France ranks 4th out of 27 countries. This is quite striking when compared to its 24th place ranking on optimism about the future!

When asked what makes or could make them happy, the French say more money (46%) or a good financial situation (44%), almost on par with physical wellbeing (51%) or a happy family life (46%).

This rather materialistic approach to happiness brings France closer to Hungary, Russia or South Korea and makes it different from neighbours like Belgium or Great Britain.

If we consider the trend over the past decade and compare it with income and purchasing power growth in the same timeframe, it is hardly a surprise to see that more people were happy in December 2010 (88%) and fewer in March 2017 (68%).

It remains to be seen if relief and income support programmes implemented by the government since March 2020 will be enough to keep it "happiness" at the level measured in August 2020.

## WHAT DO THE FRENCH SAY MAKES (OR COULD) MAKE THEM HAPPY?



**46%**

**MORE MONEY**

OR A GOOD FINANCIAL SITUATION (44%)



**51%**

**PHYSICAL WELLBEING**



**46%**

**HAPPY FAMILY LIFE**

## FRENCH BUSINESSES WERE CAUGHT OFF-GUARD BY REMOTE WORKING



**Youmna Ovazza**  
Vice President, Strategy 3

**On the bright side, it might be that remote workers will drive less, pollute less, and shop more in stores nearer their home.**

**Research conducted by Ipsos in July 2020 indicated that roughly a third of all employees had been working from home as a result of lockdown, a quarter were on furlough and another third had seen their income diminish.**

In many cases, had their employer or business entered digitisation faster, earlier, or even at all, their situation might have been different. In 2019, France was ranked 15th in European Union's Digital Economy and Society Index (DESI). The reasons for this relatively low position include:

- Only 24% of French SMEs made use of online collaborative tools, such as Microsoft Teams and Slack.
- Only 2% were considering the use of these tools.
- 15% of all SMEs only were selling their products online.<sup>7</sup>

The current crisis accelerated a process of “workplace and marketplace hybridation” where office and home, as well as brick and mortar and eCommerce, are now part of a more or less seamless continuum with a complete blurring of once rigid lines of separation. But the impact of this transformation on the French economy will be dramatic. Offices and retail outlets formed a coherent ecosystem (catering, cafés, restaurants, car parks, gyms, bakeries). They employed many people, were built, supported and maintained by many more people, and supported communities through the jobs they provided and the taxes they paid.

On the bright side, it might be that remote workers will drive less, pollute less, and shop more in stores nearer their home. The sharp divide between suburbs, which are empty and quiet on weekdays, where elderly people feel isolated and social interactions are minimal, and central business districts, which are deserted on weekends, could disappear and social life be more equally distributed across spaces.

During 2020, many observers predicted a lasting urban exodus to the countryside as a consequence of Covid. Real estate agents braced for it but saw very little of this happening. The real estate market “bubble” didn't bust but affordability and mobility didn't improve either.

If office space is likely to become cheap, housing will certainly remain the priority issue for city dwellers. The dark side of this trend is quite easy to figure out too: remote working might have a negative impact on employee engagement, eCommerce might destroy far more jobs than it is creating, geographical inequalities (often cited to explain the gilets jaunes movement of 2018-19) would deteriorate.

Whatever happens, there is an urgent need to anticipate what the future can be and to reorganise all businesses accordingly, large and small.

## LUXURY SHOPPERS ARE PRIVILEGED- AND THEY KNOW IT



**Françoise Hernaez**  
Cultural Intelligence

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**They are perfectly aware of being privileged and are happy to be able to enjoy what their money can buy, without feeling guilty about it.**

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**The Covid pandemic and subsequent lockdown have shifted affluent consumers' focus towards wellbeing and healthiness. Pleasure-related "sensorial" categories like body care, fine wines, furniture, and casual wear have become coveted luxuries. One of the things these products have in common is they can be enjoyed at home and without socialising, unlike makeup and fragrances.**

Cars, watches and jewellery were more affected by the crisis because they are associated with a dynamic, busy, mobile and social lifestyle.

Older consumers also kept their distance from brand fascination. "Experiential luxury" is increasingly taking the upper hand on "show-off luxury".


Consumers interviewed for our *World Luxury Tracker* have been struck by the effect of the crisis on economic and social polarisation. Their concerns about the consequences of growing inequalities don't negatively affect their propensity to spend money on luxury goods. They are perfectly aware of being privileged, and are happy to be able to enjoy what their money can buy, without feeling guilty about it.

"Privilege" is now increasingly the word they spontaneously use to describe luxury.

The context also favours brands which take a stand on cultural issues. Luxury brands are expected to be inclusive and committed. Feminism, Black Lives Matter, Body positive, etc. have found their way into collections and advertising and clearly play an essential part in how the luxury industry sees itself and its social role.

Yet, from a consumer perspective, there is still a long way to go before transparency and credibility in ethical commitments can be fully acknowledged. Although actions taken during the epidemic were a rare occasion of showcasing brands' commitments, such as production for brands to showcase their social commitments (by manufacturing face masks and sanitizer gel, for example) products' impact on the environment remains a sensitive issue and environment-friendly claims are still very difficult to sustain.



A woman with brown hair, wearing dark sunglasses, bright red lipstick, a light pink turtleneck, and a dark red coat, is shown from the waist up. She is holding several shopping bags (brown, black, and red) in her left hand, which is wearing a black leather glove. The background is a bright, out-of-focus outdoor setting with a blue structure visible.

Luxury shoppers have been struck by the effect of the crisis on economic and social polarisation. Their concerns about growing inequalities and their consequences don't negatively affect their propensity to spend money on luxury goods.

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## OPENNESS TO TELEMEDICINE AND PREVENTATIVE HEALTHCARE



**Yves Morvan**  
Service Line Leader, Healthcare

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**In its white paper entitled *Ma Santé 2022* (My Health in 2022), the French government announced that it would create 4,000 jobs aimed to help healthcare practitioners use and develop digital solutions.**

During the Covid outbreak, only a third of all French GPs have received training and support from telemedicine application developers. There is still much to do in order to prepare French healthcare practitioners to successfully face the challenges of digital healthcare.

But patients will need support and education too. Contrary to expectations, most are open to telemedicine. Smartphone ownership has reached a decisive level this year, including among demographics who had traditionally been more reluctant or unable to cope with them, such as the elderly. Digital applications like Doctolib, which swiftly shifted from consultation scheduling to teleconsultation services, have contributed to a fast appropriation of new technologies.

In France, like elsewhere, data protection and confidentiality concerns are the most important barriers to the development of telemedicine and preventive healthcare applications. Many jobs are still to be created to help practitioners and healthcare providers to cope with these issues.

Another important issue is that most preventive healthcare

**In France like elsewhere, data protection and confidentiality concerns are the most important barriers to the development of telemedicine and preventive healthcare applications.**

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applications are still not eligible for social security refunding because their medical efficacy has not been officially demonstrated yet. However, an application like Moovcare®, a digital therapy based on a weekly questionnaire designed to detect a risk of lung cancer recurrence, could prove to have a beneficial impact on both patients' health and care provision costs. Moovcare® has thus been made eligible for drug spending coverage because clinical trials had demonstrated almost an eight-month increase in average survival expectancy.

Too many digital health applications are still being launched without a preliminary survey of potential users' needs, expectations and constraints. User experience is actually as important as demonstrable efficacy since the latter clearly depends on potential users' interest for the application and comfort with using it.



# SHOPPERS DEMAND A SEAMLESS OMNICHANNEL EXPERIENCE



**Ludovic Dalle**  
Service Line Director -  
Mystery Shopping

**Retail outlets can increasingly be characterised as “windows” into a brand, not necessarily places to shop. When Nike opened its 2400sqm flagship store on the Champs-Élysées last July, the brand described it as a way to “propose the most fluid consumer experience that could be possible.”**

Cathy Sparks, Vice President Nike Direct Stores & Services, told a French newspaper: *“Nike experienced record growth of its online sales during lockdown, with unprecedented levels of app downloading. Yet consumers want to keep a physical connection to the brand. Retail is not dead, but it must adapt. Our goal is to propose an experience which blends the best of both digital and physical.”*

Consumers will only return to brick and mortar stores if they find retailers offer the kind of experience which they can only experience in-person and not online. Mystery shopping itself has become “mystery navigating” and “mystery calling”. Call centres’ quality of service is thus what our clients want to evaluate as a priority because they have become the one entry point for any kind of customer relation.

Telephone remains the point of contact which demands the least effort, along with emails, chat boxes, and Facebook or

Instagram pages. What really matters is the continuity and seamlessness of customer experience across these channels and ultimately to the final point of sale.

When a potential car buyer has decided on the car they want on the brand’s website, has asked for information on the phone, has completed their search on Instagram, they must be certain that the appointment will be honoured, that the right model has been ordered, they can take it for a test drive and, finally that the car will be available at their chosen dealership.

## What to do and what not to do





## FRENCH BRANDS TAKE A STAND



**Arnaud Care**  
Service Line Leader –  
Brand Health Tracking

**In their communications, too many brands still seem to react to consumers' expectations rather than anticipate them.**

**Ipsos' approach to brand equity defines "context" as an essential feature of any given market. Brands are chosen in a context.**

In normal times (i.e. before the pandemic), consumers were estimated to have made 35,000 decisions daily, one every two seconds. Therefore, standing out in the moments that matter is essential for a brand to be chosen. But in today's context, this is even more crucial as uncertainty, confusion, apprehension and complexity have (re)appeared in many instances routine used to prevail. Brands need to find a way to remain relevant in these times.

There are three points for brands to remember:

- 1. Guide consumers to help them find their way in a complex and confusing environment. Make their life simpler!**
- 2. Give more meaning to the ordinary things they bring you or allow you to do, so that they are seen as worth the time or money when so many other emergencies arise.**
- 3. Be practical when so many things appear to be burdensome.**

In their communications, too many brands still seem to react to consumers' expectations rather than anticipate them.

The way they decide to take a stand alongside social/political issues of the day will be a determining factor that will give more meaning to their products and therefore stand out among competitors.

Brands are certainly acting in good faith, for example by removing mentions of white/whitening, fair/fairness, light/lightening from their makeup products' labels in order not cause offence. But by doing so they still appear to be reacting to a trend, not abiding with steadfast principles...

This is why brands must now accept their social responsibility and fully embrace values which they associate with and which their buyers are also inclined to associate them with. By doing so they can themselves **change the context** in which buyers choose brands and really stand out.

In doing this, marketers must remember that the context is a patchwork of many complementary elements: cultural meaning, physical availability, message wording, experience, emotions and motivations.

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# IPSOS FLAIR COLLECTION

## FRANCE 2021

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Launched in 2005, the Ipsos Flair Collection was created in order to affirm Ipsos' intellectual leadership and relevancy of its experts:

- Analysing countries' mood and feelings of consumers-citizens
- Exploring key topics (aging, emancipation of women, the environment, purchasing power, changing attitudes, the impact of digital)
- A selection of successes and examples for strategists

Ipsos Flair is a precious tool in line with Ipsos' positioning and new signature:

**“Be Sure. Act Smarter”**

The full Ipsos Flair report can be found at <https://www.ipsos.com/en/flair-collection>