

An aerial photograph of a vast, frozen lake, likely Lake Baikal, showing a complex network of cracks and ice floes. A small figure of a person is visible in the lower right quadrant, providing a sense of scale. The overall color palette is dominated by various shades of blue and white. A diagonal graphic element consisting of a teal and a dark blue stripe runs from the top left towards the center.

RUSSIA 2022

IN THE FLOW OF CHANGE

IPSOS
FLAIR COLLECTION

GAME CHANGERS



IPSOS FLAIR: UNDERSTAND TO FORESEE

HENRI WALLARD DEPUTY CEO - IPSOS GROUP

Despite a challenging environment marked by the Covid-19 crisis, the ambition of *Ipsos Flair* hasn't changed. It is an international publication about the values and attitudes of consumer-citizens and how they shape their views on all actors of society, providing in-depth analysis and recommending the best strategies.

It is a good moment to help people around the world to better understand Russia based on research and experience of our experts.

Ipsos Flair is about instinct and intuition, the ability to capture the

atmosphere of a country, to perceive the right direction, and to know when to act.

It is another way of seeing, with survey results as sociological symptoms to understand the true relationship between people and everything around them.

Breaking away from stereotypes, Flair affirms Ipsos' intellectual leadership, freedom of spirit, and expertise through:

- Analysis of people's motivations and expectations

(their perceptions, trust, and frustrations)

- Exploring key topics (including demographic shifts, the environment, consumer behaviour, new attitudes, and the impact of technology)
- Success stories and case studies.

This year, we focus on what the Covid-19 crisis had changed in the behavior of Russian consumers, but where possible going further to consider their roots and cultural developments.

By bringing together diverse and complementary perspectives, the Ipsos Flair series helps our clients to formulate and to fine-tune their strategic planning approaches. Flair is just one tool that allows Ipsos to: "*Be Sure. Act Smarter*".

Enjoy your reading!

Flair is also developed in Brazil, China, France, India, Indonesia, Italy, the Kingdom of Saudi Arabia, Mexico, Peru, South Korea and Thailand.

EDITORIAL

YVES BARDON IPSOS FLAIR PROGRAMME DIRECTOR, IPSOS KNOWLEDGE CENTRE

Although the Covid-19 crisis is not yet fully resolved around the world, can we still look past it, into the future? What conclusions can we take from it today? Has it changed our values and our behavior?

We remember the prophetic announcements in 2020 of a new world of reduction, de-consumerism and great upheavals. It is much fairer to speak of the same world of accelerating, pre-existing trends, as illustrated by the 2021 Ipsos Global Trends survey and the thought-provoking future-building scenario of “Shaping 2025”¹. The world has changed less than some imagined, and the concerns remain those of 2019.

Interestingly, Russians are very aware of this natural human tendency to adapt rather than transform. 67% of them agree that the Covid 19 pandemic has shown how quickly people can change

their behavior in a crisis – much lower than 87% in South Africa, 83% in Turkey or 82% in China².

Despite the challenging situation created by the health crisis, Russians are also less pessimistic than the other inhabitants of the planet. In October 2021, only 22% felt coronavirus was a top issue facing their country, compared to 29% globally, 38% in USA and 34% in the UK. The most important concerns in Russia are poverty & social inequality (54%, as in December 2021) and unemployment & jobs (27%). Russians do not seem to be worried about environmental issues, widely publicized in particular during the UN Climate Change Conference (COP 26): 3% (vs. 16% globally) say they are worried about climate change.

Despite many critics addressed to Russia in foreign media, internet

searches return pages showing a super attractive country with architectural wonders, a grandiose heritage, breathtaking landscapes, and dramatic and excellent cultural ventures. Russia was highly decorated in the 2021 World Travel Awards, the “Oscars of the tourism industry”: Moscow won the prizes for Europe’s leading urban destination while Saint-Petersburg was crowned Europe’s leading heritage destination, ahead of Paris, Amsterdam, Athens, Berlin and even Venice.

In one of our previous editions of *Flair Russia*, we noted that the international embargoes placed on Russia created the conditions to relocate production and find ways to be more independent. Covid-19 has also played the same role to an extent, by creating a life under constraints and the need to switch to “coping” behaviors. And it is not the least paradoxical element of this crisis that conditions are created for new opportunities.

The home is the chief symbol. In an environment that has become dangerous with the risks of contamination and because of the various restrictions, the home has become more associated with cocooning, protection, and wellbeing, a

space that can be controlled, improved, and transformed. In Russia in particular, there has been a kind of nostalgia for everything that the “dacha” (country house) represents for urbanites; an ideal, social status, a reunion with nature, and so it has seen a great deal of investment.

The home is becoming the center of our world. The pandemic-led physical limitations for retail created a sharp change in the patterns of purchasing behavior and a new buyer was born, one that flexibly moves between offline and online purchasing channels and comfortably interacts with technology in-store and online.

Because the crisis was frightening, revealed unexpected fragility, and provoked change, we must provide responses that are both practical and psychological, using an empathic and emotional approach thanks to our ever-finer understanding of consumer values, motivations, and expectations. It is the vocation of *Ipsos Flair* to help brands and strategists to find the keys to success, particularly in crisis situations!

IN THE FLOW OF CHANGE

EKATERINA RYSEVA COUNTRY MANAGER RUSSIA, IPSOS

In 2021, our clients often asked us not only to describe the changes in Russian people's consumption and purchase behavior, but also to characterize the socio-cultural profile of Russian residents. Indeed, the value of this information during periods of change increases. Cultural attitudes that exist in society influence how people will react to changes, the speed of adoption and adaptation, and the mentality we take into the future.

We have decided to take a systemic approach to answering this question and study the socio-cultural profile of the Russians within the framework of *Flair Russia*, which in 2022 is our fourth edition. Read more about the research methodology and findings in the first article of this issue. 30 years where Saudis have been so

united and rightfully proud of their culture and willingness to embrace change, transformation and potentially opportunity.

I would like to share my conclusions from these findings:

- The data disproves the myth that the Russian people have a negative outlook. It is common to hear that we are not positive and are distrustful, but we find that, actually, the attitude towards other people is neither positive or negative.
- There is a trend towards being more active: making independent decisions, not waiting until something passes on its own, and encouraging initiative.

- Russians are not prone to fatalism and are ready to take their fate into their own hands.
- Being “savvy”; demonstrating the ability to find unconventional solutions, has always been a strength, and people have become even more ingenious in the past five years: constant crises, falling incomes – all these factors contribute to people's ability to adapt to difficult environment conditions, while avoiding risks when possible.

We took a detailed analysis of the profile of the Russian population one step further and looked at the findings through the prism of transition from the complex VUCA (volatile, uncertain, complex, ambiguous) world¹ to a new concept: the chaotic and disturbing BANI (brittle, anxious, non-linear, incomprehensible) world². We would like to offer our readers some food for thought. Which features of the Russian mentality will represent “superpowers” for a person's more comfortable life in the new BANI

world? Where can companies and brands place their efforts to power-up the qualities that so far are under-developed for this context?

In this issue of *Flair Russia*, we also reflect on how everyday life in Russia and the Russian character are changing from different perspectives that include family values, the home, life in the city and the countryside, leisure activities, shopping, and health.

All this will help brands to understand their customers not only as consumers and buyers, but also as people from a more human point of view. This can also become a starting point for building an empathic brand ecosystem³ which, in turn, will provide fuel for further strengthening the strategic role of insights⁴ and their more active influence on decision-making in the future development of brands.

We have called this *Flair Russia* 2022 issue “In the Flow of Change”. Developing businesses and brands in

¹ VUCA is an acronym for English Volatility, Uncertainty, Complexity, and Ambiguity. A concept that emerged in the 1990s to denote the uncertainty of the future.

² BANI is an acronym for English Brittle, Anxious, Nonlinear, and Incomprehensible.

³ Ipsos Knowledge Center. *Empathy Awakened*. November 2021

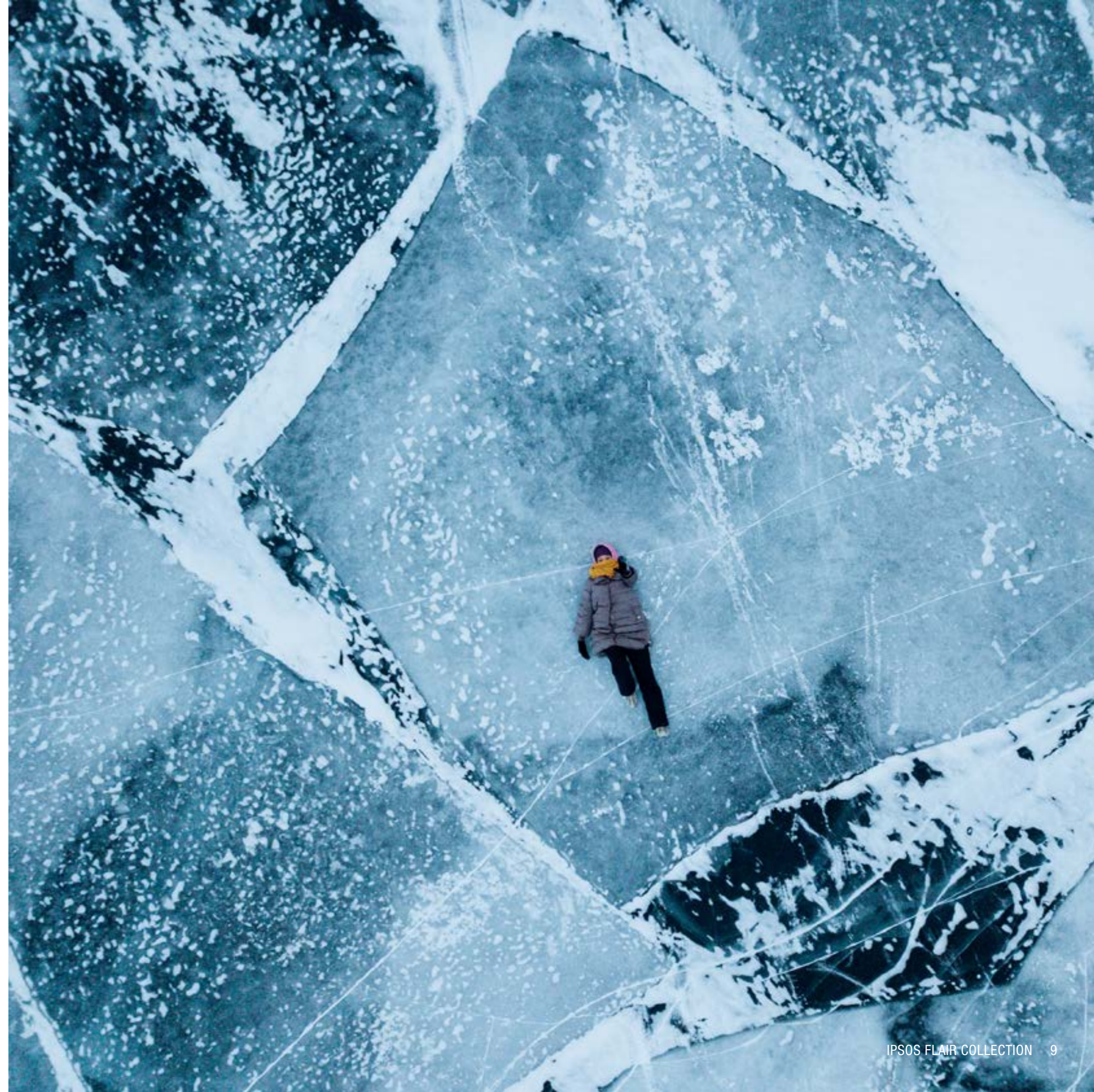
⁴ Ipsos Knowledge Center. *Transforming the Insight Function*. October 2021

a world where stability is becoming an anachronism is quite challenging. Yes, changes are constantly taking place today, and we must get used to it.

But what does it mean to “be in the flow”? Flow is a state of high engagement when you get maximum satisfaction from the process.⁵ I believe it is completely applicable to the researcher’s work. In a constantly changing world, the value of the researcher’s work and the scales of research tasks are only growing. That is why it is so important to learn to be in the flow. This will both bring the most efficient result and generate inspiration.

I hope that you will find many starting points for understanding the current changes in our new Flair Russia. The team of Ipsos in Russia is always ready to help you choose the right direction in this flow of change.

⁵ The term “flow” was introduced by American psychologist Mihaly Csikszentmihalyi in his book Flow. The Psychology of Optimal Experience.



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SOCIAL CODES AND VALUES





IN THE FLOW OF CHANGE
**CULTURAL
PROFILE OF
RUSSIAN PEOPLE.
PATH TO NEW
WORLD**

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The VUCA world (standing for Volatility, Uncertainty, Complexity, and Ambiguity) in which we have been living in the past decade is no longer relevant today. It is being replaced by the BANI world, which is characterized by the following alternative descriptors: Brittle, Anxious, Nonlinear, and Incomprehensible. When standing on the border between two worlds, we receive many questions about what it means to be Russian. What is the person living in Russia today like? How will he or she react to external changes, whether value-based and technology-relateds? How has the VUCA world influenced them and how will they find their feet in the BANI world? In this article, we will talk about the results of our study into the cultural profile of Russian people through the prism of change and framework of facing an uncertain future.

When analyzing the cultural profile of Russians, the Ipsos team identified 12 basic characteristics that are often used to describe the collective image of a “Russian resident.” We also took into account typical stereotypes such as “unsmiling nation,” “inert people”, “living beyond their means”, fatalism, and a desire to live against the rules. We included the iconic characteristic of “savvy” in this profile and assessed the strength of

adherence to tradition, the need for a “great idea”, straightforwardness, willingness to take risks, and, of course, the notorious collectivism and heterogeneity of cultures in a country stretching across 11 time zones.

For each of the 12 characteristics, we selected three statements to describe them and conducted a quantitative study among the urban population of Russia aged 18+.¹ We asked questions

¹ The survey within the Ipsos study Cultural Profile of Russia took place on November 12-16, 2021 using the Ipsos i-Say online panel. The company surveyed 1,987 adults aged 18-64. It asked two questions:
Q1. To what extent do you agree with each of the following statements? (scale from 1 to 7)
Q2. Please say how your views have changed in the past 5 years for each of the following statements (scale from 1 to 7)

not only about what people associate themselves with at the moment, but also about the extent to which their

attitude has changed in the past five years.

WHO ARE WE, THE RUSSIAN PEOPLE?

According to Chart 1 with the NET indices² of the current self-perception of people in all the characteristics, the generalized profile of a Russian resident is as follows:

- A heterogeneous nation of straightforward people true to their traditions. They do not strive to live against the rules, but they are not passive, characterized by savviness and the believe that there is a way out of any challenging situation. They need to see a “Great Idea” for the country.
- Refuting the myth about an “unmirthful culture,” one in two respondents consider themselves to be a positive person.
- The myth about the nation’s collectivism is not confirmed as the desire to prioritize common good over the personal good is weak.
- The Russians prefer to live for the moment, but contrary to another stereotype about Russian fatalism, one in two believe that they can change their life if they desire to.

² NET indices are calculated by subtracting the share of people who choose two lower evaluations of the scale (1-2) from the share of people who choose two upper evaluations of the scale (6-7). TOP2 and BOTTOM2 averaged for three statements in a block are taken for each of the 12 characteristics.

SOCIOCULTURAL PROFILE OF RUSSIA.

NET SCORES. DIFFERENCE BETWEEN %TOP2 (6-7) AND BOTTOM2 (1-2)

Chart 1. Today

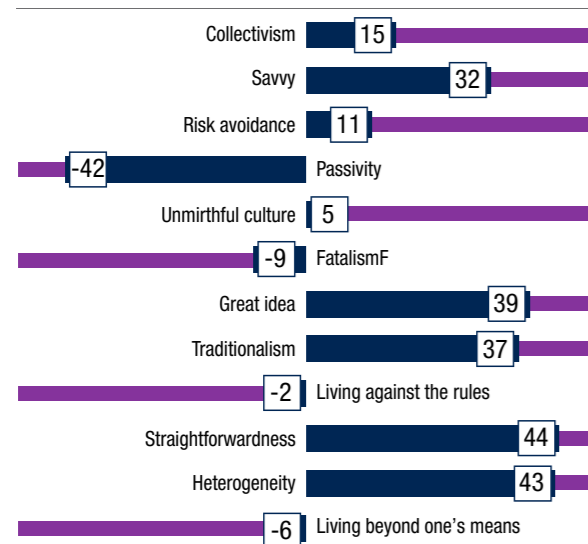
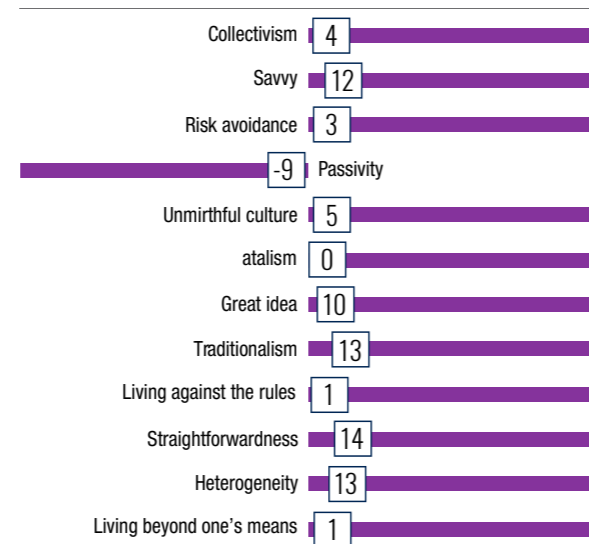


Chart 2. Changes in the past 5 years



Source: Sociocultural Profile of Russia. Russians, 18-64. Online survey, Ipsos i-Say panel. Data collection: November 12-16, 2021 N=1,987

Q1. To what extent do you agree with each of the following statements? (1-7)

Q2. Please say how your views have changed in the past 5 years for each of the following statements. (1-7)

AGE PROFILES

The age-specific peculiarities we found are quite marked in terms of individual characteristics, especially in the youngest group of respondents (18-24 years old) – see Chart 3. Here the world outlook is formed under the influence of an independent, economically active life experience for

many people. Young people tend to take risks more often, but their level of collectivism is somewhat higher than that of the people belonging to other age categories; they show a stronger need to feel a “shoulder-to-shoulder” – with their parents, colleagues or friends. Level of

savviness, according to respondents’ self-assessment, is significantly lower at the beginning of their independent life. However, from as early as the age

of 25, the share of people who believe that they are savvy significantly grows and practically does not change till the end of their lives.

Traditionalism is almost half as strong in the youngest age group (18-24 years old) vs. the average of all respondents. They more often welcome changes in values and culture: only 26% consider themselves adherents to traditional values (the average for all ages is 53%), while only 37% support the preservation of the traditional roles of men and women (the overall score being 59%).

The acceptance of traditionalism is significantly higher in the groups aged over 25. Here, between 45% and 66% consider themselves adherents to traditional values, while 55% - 67% stand for the preservation of established gender roles.

The younger generation is less likely to be straightforward and willing to explicitly express their point of view if it differs from the opinion of the majority. However, this is still quite high (47%), as it is for all Russians (50%, on average).

The representatives of the youngest age group also show less of a need for a “Great Idea”. Great idea includes the importance to see country’s success and achievements, desire to contribute to country’s success and the importance to have Great Idea for the country itself. Only 38% say they need to see country’s successes and achievements, while this rises to 62% by the age of 55.

Passivity is not very high for the total population (9%) and, unexpectedly, it does not grow but rather decreases with age. Today’s older generation is losing the features of “old Soviet ladies” who would spend their days on outside benches. This is no longer a “time left to live,” but an active life full of personal freedom, at a time when children have already grown up and become independent.

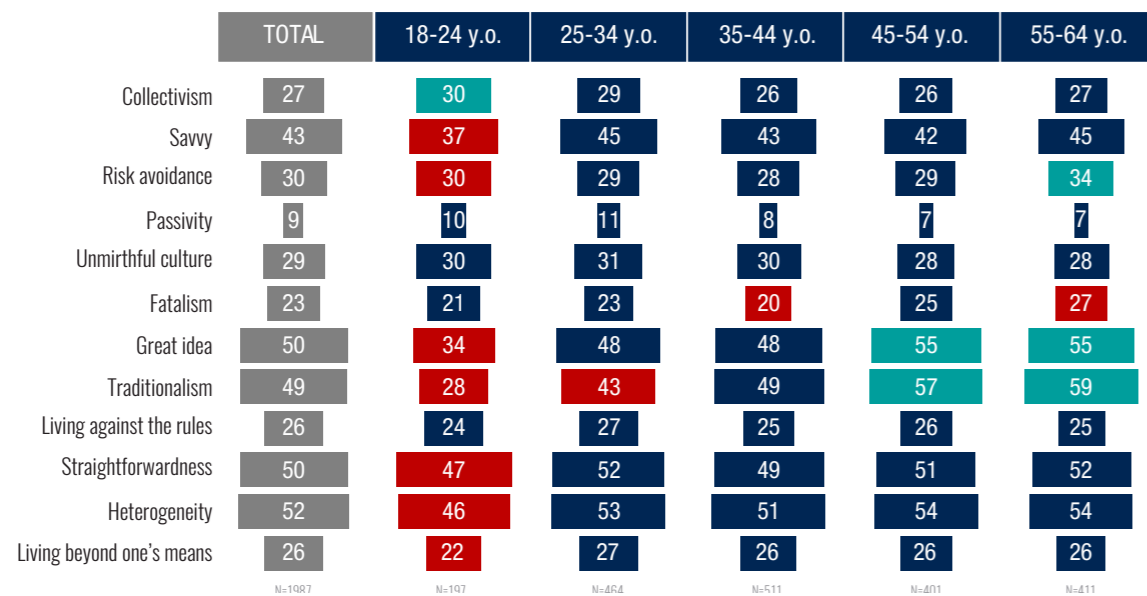
On the other hand,, fatalism is more pronounced in the oldest age group (27%). The lowest level of fatalism is

at middle age (20% for those aged between 35-44).

Chart 3 PROFILE OF RUSSIA. BREAKDOWN INTO AGE CATEGORIES

TOP2 (6-7), MEAN % FOR THREE STATEMENTS IN THE CATEGORY

Today's self-assessment



Source: Sociocultural Profile of Russia. Russians, 18-64. Online survey, Ipsos i-Say panel. Data collection: November 12-16, 2021 N=1,987

REGIONAL PROFILES

The analysis of regional profiles (Chart 4) reveals interesting peculiarities, such as people from the **Central District** are more willing to take risks and are less committed to traditions. Here we find a high

percentage of positive people (55%). At the same time, the Central District, like the neighboring North-Western District, is characterized by the lowest levels of perceived condemnation received from other people – 44% in

each of the districts vs. 48% in the total sample.

The North-Western District stands out with lower scores for 10 of the 12 characteristics included in the study. Collectivism, savvy, fatalism, the need for a Great Idea, and a desire to be proud of country's achievements are significantly less

pronounced here compared to other regions. Neither traditionalism nor a desire to live against the rules, or a desire to live beyond one's means are strong in this district. These people are more homogeneous and less straightforward. Distrust towards strangers is significantly less pronounced here than in other regions.

However, only 41% of respondents consider themselves positive people, the lowest level in the whole country (which scores 53% on average across all districts).

On the contrary, the **Southern and North Caucasian Districts** (58%) comprise the highest share of positive people. People from these regions are exceptionally straightforward, committed to traditions, and less willing to take risks. Society here is much more heterogeneous than in other parts of the country. Unfortunately, these people also report the highest levels of condemnation within society: 56% vs. the total level for the country at 48%. This means these regions are significantly higher in terms of an “unmirthful culture” than the rest of the country.

However, the **Ural District** demonstrates the highest result in “Unmirthful culture.” Although the share of people who consider themselves positive is among the largest ones here (55%), the survey also shows an exceptionally high level of distrust toward strangers: 49% vs. 35% for the country in general. The Ural District also takes the second place after the Southern and North Caucasian Districts in the level of condemnation faced by people (54%). Other peculiarities of the Urals are a more pronounced desire to live against the rules and the highest level of savvy in the country.

Siberia stands out for its heterogeneity, straightforwardness, traditionalism, and a need for a Great Idea. The **Far East** conversely demonstrates a lower level of straightforwardness and traditionalism. At the same time, its

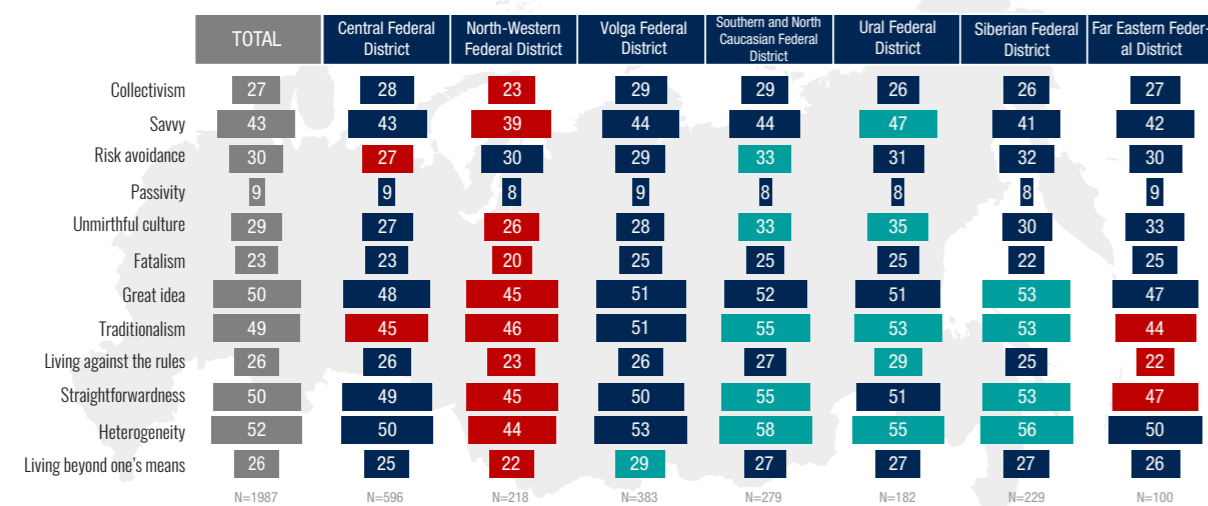
residents are characterized by a lower desire to live against the rules vs. the country in general.

The Volga District stands out from others with only one parameter – a desire to live beyond one’s means.

Chart 4 SOCIOCULTURAL PECULIARITIES OF REGIONS

TOP2 (6-7), MEAN % FOR THREE STATEMENTS IN THE CATEGORY

Today’s self-assessment



Source: Sociocultural Profile of Russia. Russians, 18-64. Online survey, Ipsos i-Say panel. Data collection: November 12-16, 2021 N=1,987

HOW HAS THE VUCA WORLD INFLUENCED US?

The term “VUCA”³ was invented back in the 1990s and has taken root in the

business community for a long time to denote fragmentation, chaos, and

³ VUCA is an acronym for English Volatility, Uncertainty, Complexity, and Ambiguity. The concept emerged in the 1990s to denote the uncertainty of the future.

fast pace of living. In Russia, people started using it much later when, after the 2000s, the active development of international companies began to use current western terms, including convenient abbreviations to denote a complex external environment. The VUCA world in Russia is rather the period after the 2010s, especially fueled by the 2014 sanctions-related crisis. The changes in the Russian

cultural profile under the influence of the VUCA world can be assessed using data obtained in response to the question asked within our study about changes in respondents’ views in the past five years (Chart 2). The five characteristics that have intensified are straightforwardness, heterogeneity, traditionalism, savvy, and the need for a Great Idea.

The unstable and volatile VUCA world has created an excellent catalyst for further strengthening Russia’s national characteristics and a subject of special pride – savvy.

One in five Russians now associate themselves with an ability to find a way out of challenging situations and, more than before, they look for new ways and means to solve problems. In the best traditions of the saying “there is only a shard of a joke in every joke,” a popular online meme has appeared, saying: “If a zombie apocalypse occurs when you are on vacation, stay close to Russian tourists to increase your chances of survival.”

Grappling with the complexity and variability of the environment has further reduced Russians’ passivity. Contrary to the popular image of the Russian fairytale character Emelya lying on the stove, Russians do not consider themselves passive. On average, one in two say they do not agree with living at someone else’s bidding and waiting until problems have resolved themselves.

The overall perception of Russians as people unwilling to achieve anything rather suggests that we are living in “energy-saving” mode until the external environment becomes uncomfortable.

The VUCA world, which is displacing us from the comfort zone, has become a good incentive to increase activity, as we can see in the changes shown within the chart.

At the same time, people do not feel that they are subject to their fate. Only one in 10 believes it is impossible to change their fate, yet the past five years has seen people start to feel a stronger **pressure of fate**. The VUCA world has added complexity, but it has not suppressed people.

It is interesting to note that, despite their overall moderate **propensity to take risk** (39% of the respondents prefer not to risks for no reason, while 27% feel uncomfortable if they need to take risks), the VUCA pressure has not had a significant effect on risk-avoidance.

It is interesting that the demand for a Great Idea and for traditionalism have both grown almost equally in the past five years. One in two wants to see the successes and achievements of Russia, wants to do good to their country, and would like their country to have a **Great Idea** – i.e. the patriotic idea that the country should develop to secure its prosperity

now and for the future generations. Approximately one in five say that they have started feeling more pronounced aspirations of this kind in the past five years. The reason is partly the strengthening of localism with the growing importance of local affairs in the life of individuals today.

Russian people are ready to look for new ways to solve problems, however, when it comes to values, 59% call themselves adherents to **traditional foundations**. Some 53% confess that they do not welcome changes in culture and values while 36% would not appreciate a change in gender roles. One in five report the strengthening of these sentiments in the past five years. This is partially due to increased state propaganda of patriotism and traditional values during this period. However, there may also be another reason: the stronger the “wind” is, the stronger the “roots” must be to feel sure. It is important for people to understand what they can rely on in the conditions of a more complicated chaotic environment. The feeling of a strong country and invariable traditions is something that may give confidence and support. Therefore, even if such messages are initially propaganda, they may fall on

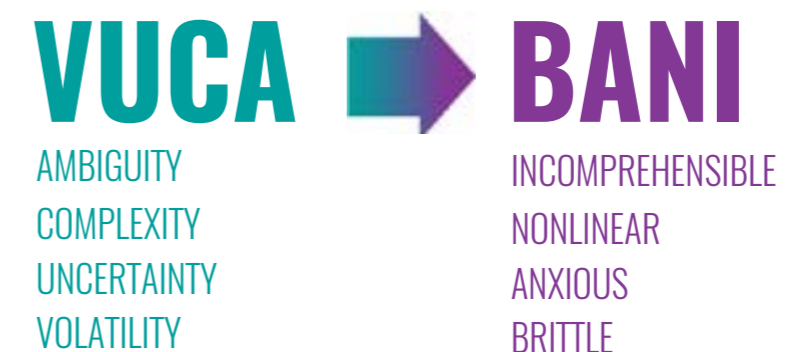
a fertile soil as they comply with a person’s inner need.

An interesting VUCA manifestation is a growing **straightforwardness in communication** over the five-year period. The increasing complexity (and acceleration) of the environment, multitasking, the growing amount of information, and increasing productivity cause people to begin to communicate in a more and more direct and concise way. Even greetings and goodbyes can disappear from interactions. Despite the ubiquitous talks about the importance of soft communication skills and the need to introduce such subjects at schools, universities and corporate training programs, the current data does not show that we are moving towards more empathic, caring and empathic ones.

At the same time, half of respondents prefer to say what they think, and are not afraid to share an opinion

that differs from the position of the majority. The same proportion also like to communicate with straightforward people. One in five has felt this more acutely over a five-year period. One respondent told us: “I have no time to think how my words will affect you, I need to receive and transmit information as fast as possible”. This is the motto of communication within the VUCA environment. How will it change in the BANI world?

The decreased caution in communication in the VUCA world is also testified to by the fact that one in two witness people criticizing or attacking each other in daily life. One in five has noticed this more often in the past five years. The communication environment has become less empathic, and the problem is so noticeable that people are talking a lot about it now. One of the reasons to solve it is the need to maintain good mental health. WHAT



WILL HELP US IN THE BANI WORLD?

The acronym BANI⁴ was proposed by futurologist Jamais Cascio in early 2020⁵. Unlike VUCA, which symbolized the world's complexity, BANI brings disorientation, unpredictability, and chaos. We are moving from the uncertainty of VUCA to the brittleness, anxiety, and incomprehensibility of BANI. What features of the Russian mindset have we already managed to develop that will support us to feel more comfortable amid this chaos?

- **Savvy.** BANI is about savvy. Living against the background of a continuous search for solutions to problems correlates very well with the unpredictability of consequences and reactions and sometimes illogical answers in the BANI world. The role of women is growing here: they more often tend to find a way to overcome situations (66%) and look for new methods to solve problems (43%), in comparison with 60% and 39% of men, respectively.
- **Risk avoidance.** This desire is at a moderate levels among Russians today. Savvy people who are not afraid to look

for new solutions are usually characterized by a moderate focus on risk. At the same time, women more often prefer to avoid unnecessary risks (33%), while the share of men who avoid risk is smaller (25%). Risk avoidance is a factor associated with the brittleness of the BANI world. Fragile systems work normally until it is unexpectedly exposed to a critical impact that introduces change.

- **Positive thinking.** It will be easier for positive people to endure the challenges posed by the BANI world. Women (55%) more often tend to consider themselves positive than men (50%). Positive thinking also helps maintain mental balance in the BANI world. The collective image of the Russians is that they “smile too seldom.” However, non-smiling, as we can see, is not a reflection of a negative inner world. The studies conducted during the pandemic show that the Russians were less worried about Covid-19 than residents of many other countries. Crises happen too often

in our country, but they also fade away, so people are already able to resist looking at the world in a catastrophizing way.

- **Non-passivity.** Not being passive is an important feature for living in the BANI world. Women are more proactive than men (54% vs. 46%, respectively⁶). However, as the new world is extremely brittle, any activities should be well thought-out and gentle in order not to contribute to the risks of system collapse.
- **Great Idea and traditionalism.** It is important to know what you can rely on in a fragile and chaotic world. A strong country and reliable support in the form of a “small motherland”, reflected in traditions in a person's close circle and community can serve as footing. “Russia will save the world” is the prophecy that Russians often recall at the peak of global cataclysms, and this may be reinforced in the BANI

world. Traditions do not have to be historical at all. We can talk about the creation of new traditions and rituals within a country and a family. Traditions bring constancy and set the pace in a world of chaos.

- **Social environment** heterogeneity. The diversity of the communication environment nourishes flexibility and openness in thinking, and helps us to see unconventional solutions. We find that 70% of Russians say that their social circle comprises people of different ages while 56% communicate with people of different nationalities and 32% have friends with very different beliefs and views. This diversity has increased in the past five years, and, with more active migration, this will grow in the BANI world, fueled by trends of social diversity and inclusion.

⁴ BANI is an acronym for English Brittle, Anxious, Nonlinear, and Incomprehensible.

⁵ Facing the Age of Chaos. Jamais Cascio. Medium.com. 29.04.2020

⁶ Averaged Bottom2 values for the Passivity block of statements with a breakdown into gender.

WHAT WILL COMPLICATE OUR LIVES IN THE BANI WORLD?

The three characteristics listed below will significantly complicate Russian people's life in the BANI world. They are closely interconnected: straightforwardness and condemnation result from an excessively individualized society (with low collectivism).

- **Straightforwardness.**

A complicating factor in the brittle BANI world, straightforwardness can be considered a synonym for the absence of empathy, especially in Russia. Straightness contributes to the brittleness and anxiety of the BANI world. With women more likely to explicitly say what they think the trend towards gender equality will continue to fuel this straightforwardness, while further reducing it among men looking for a “new self.”⁷ It will probably be neutralized by the trend toward empathic communication and respect for others, especially if gender equality ceases to be a pressure point with time: a young generation without pronounced

gender stereotypes is already growing now.

- **Inclination toward**

condemnation. Half of our study participants (48%) often face situations in which people condemn each other, with women (52%) finding this more often than men (43%). Despite numerous talks about the importance of developing soft skills, competitive communication still dominates in Russia. We are only starting to take the first steps toward an empathic society. Condemnation that often arises as a hasty, spontaneous reaction to something means that people receive little external support. This, as well as the generally accepted environment of judging and criticizing ideas in Russia only increases the brittleness and anxiety of the BANI world.

- **Low collectivism.** Collectivism has acquired a negative connotation in Russia as an inherited part of the USSR era

when it was inappropriate to stand out. As a result, compensatory hyper-individualism arose during the post-Perestroika years “Me” or “mine” became of prime importance. Urban residents could rarely recall their neighbors' names at the time. People are more likely to join forces in Russia to carry out a protective function, for example when it is necessary to fight common enemies. Russian people turn to ideas of collectivism when they seek help and support. However, people prefer to maintain their individuality during non-crisis periods. The data shows that only one in four people are willing to sacrifice something for the common good. However, individualists feel less protected in the BANI world, so the need for collective protection from a hostile environment is growing.

The BANI world concept was not created to further spread panic. Its function is to comprehend, prepare,

and see opportunities for people and businesses in this chaotic world. Brittleness implies preparing a “safety bag” to protect the autonomy of individual elements. Anxiety can be reduced through empathy and compassion, while nonlinearity is neutralized through adaptability and flexibility, and incomprehensibility through transparency and development of intuition. More often, the answer is both a decision and a reaction, but comprehending change in the BANI environment suggests that it might be difficult to find answers⁸.

Considering the growing importance of working with purpose and social meaning, it will be useful for brands to help their customers and employees arrange their life in the BANI world, to power-up those aspects of Russian consumers' mentality that complicate their life in the new reality, and to maintain or strengthen the existing characteristics of their social profile to help make their lives more comfortable in the new context.

⁷ Man of the 21st Century in Russia. How Traditional Masculine Roles Transform. Flair Russia 2022

⁸ Facing the Age of Chaos. Jamais Cascio. Medium.com. 29.04.2020

KEY TAKEAWAYS

- This study of the Russian socio-cultural profile has shown that Russians can be characterized as a heterogeneous nation of straightforward people faithful to traditions. Russian people are non-passive, savvy, and need traditions and a Great Idea. One in two considers themselves a positive person, but people often face criticism from others. The myth about nation's collectivism is not confirmed.
- Characteristics such as straightforwardness, heterogeneity, traditionalism, savvy, and the need for a Great Idea all increased in the VUCA world. Passivity decreased even more significantly.
- A more comfortable life in the BANI world will be ensured by characteristics such as savvy, non-passivity, risk avoidance, positive thinking, traditionalism, and communication in a heterogeneous environment. On the other hand, straightforwardness, condemnation, and individualism will make life less comfortable.
- Women will feel more comfortable in the BANI world as they tend to be more flexible in finding unconventional solutions, are less prone to taking risks, and are more focused on positive thinking. The growing trend toward gender equality, including in Russia, will fuel this, too.
- The BANI framework implies a search for reactions and solutions to living in a world of disquieting chaos. As they work on their social missions, it will be useful for companies to think about how they may help their customers and employees strengthen the weaker characteristics that are important in the BANI world, and how they may support consumers in what now gives them “superpowers” for living in another new reality.



IN THE FLOW OF CHANGE

NEW PARENTING: RETHINKING OF ATTITUDES AND BELIEFS

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It is hard to predict with any certainty the kind of people today's children will grow to be in the future. However, we can consider the influence of modern practices and parenting ideas on their development. We can also think about the ways that brands seeking to appeal to this audience can connect with the "new parents"

Quite different ideas may coexist within one single society, depending on the social group or class that people belong to. For this reason, the trends described in this article cannot be extrapolated to all Russian people; some of them are more relevant to the urban population, others remain the

prerogative of a wealthier audience.

However, today's media contributes to the widespread dissemination of any ideas and views. Therefore, many people may rethink their attitudes and beliefs, and this is the context that the "new parenting" is being formed in.

PARENTING IS NOT A SYNONYM FOR MATRIMONY

The first trend in recent years is *distinguishing between parenting and matrimony*. It is noteworthy that the number of both married couples who choose not to have children

and families with unmarried parents is increasing: according to Rosstat, every fifth child in Russia is born out of wedlock today.¹

PARENTING AS A CONSCIOUS STEP

The availability and widespread use of effective contraceptive methods

contributes to a trend of *conscious parenting*. A characteristic feature

¹ Rosstat informs how many children are born out of wedlock in Russia. RIA.ru. 03.03.20

of the modern mothers and fathers is a thoughtful attitude to their role, when the decision to have children is weighted and individual rather than influenced by the state or social norms.

This trend is supported by the active development of reproductive technologies. IVF, egg freezing, and surrogacy make it possible to postpone parenting to a later age and give immediate priority to career development or other activities.

NO PARENTING NORMS

It should be noted that society has *no single normative model of parenting*. Unlike the imperative child-rearing style widely practiced during the USSR times when society would unambiguously dictate what

qualities should be instilled in a future "comrade," the current diversity of thought and practices gives men and women more freedom and blurs the idea that there is one "right" and "wrong" approach.

This blurring of ideas not only allows people to build their individual life paths, but also noticeably contributes to the level of modern parents' anxiety.

CHILDRENS AS A PROJECT

A conscious approach to parenting often leads to a situation when a child becomes *a project*, in which one has to invest economic, time-related, and emotional resources. Now, society sometimes perceives parenting as a potential area of self-actualization. As a result, we see that intense parenting, i.e., maximum involvement

in children's lives and consistent observance of child's interests, a source of extraordinary stress, is becoming more commonplace.

PARENTING AS A SOURCE OF STRESS

The new parents strive to create a favorable psychological climate and an optimal environment for their children's development. When recalling their own childhood, they do their best to prevent similar psychological traumas in their children. *New parents experience higher levels of anxiety, as choices are too wide, the list of duties is endless,*

and the responsibility is heavy as they seek to provide their child with the best. There is a dominant idea that parents are responsible for everything happening to their child now and in the future. As the future wellbeing of their children depends on their choices, parents feel like they are treading a minefield.

PROFESSIONALIZATION OF PARENTING

The axiom of parents' responsibility is fueling the *fashion of expert knowledge*. Child-rearing is more often perceived to be a job requiring

special knowledge and psychological skills. There is an idea that parents need to be taught to be parents. As the commercialization of childhood

has created an incredible industry of goods, it is no surprise that a huge array of information products have also appeared (trainings, lectures, and so on), promising to develop

parenting competencies and provide the knowledge necessary to raise and develop children from the prenatal period.

THE AMBIGUOUS IMPACT OF SOCIAL MEDIA

Modern parents are bombarded with *a huge amount of contradictory information*, including from people who are not development and child-rearing experts. Judging by the perfect snapshots posted by bloggers online, they are always doing a great job. The unrealism of the beautiful social media picture sets a benchmark, while the need to manage information flows and maneuver between relevant,

fashionable, or obsolete concepts is becoming a serious challenge for responsible parents. Support can also be found through social media, and from parenting forums where thousands of users develop collective standards and create ratings to help people make the right choices among the thousands of available options in the world of children's goods and services.

VIRTUAL GRANDMOTHERS

The digitization of the environment is an important factor. The speed of mastering new technologies not only increases the generational gap between parents and children, but it also emphasizes that the experience of previous generations is no longer in demand. The vigilance of adults

toward gadgets is in conflict with the level of trust that children have in them. AI-based virtual assistants can easily replace grandmothers if there is a need to read a fairy tale or play a cartoon. This form of parenting assistance is steadily growing in Russian households.



PARENTS LOOKING FOR PERSONAL SPACE

The practice of intensive parenting that has become almost standard in urban communities requires high engagement, funds, and leaves little room for the parent's own career achievements. On this path, social success is ensured through the successful implementation of the *child project*. Many parents do not cope well with this and encounter

an *internal conflict* between child-rearing according to Petranovskaya and self-development according to Labkovsky. This is the tension of what will be the more important focus at a particular moment in time: the desire to become a support for one's child or the individualistic desire to take care of oneself.

FAMILIES IN ISOLATION

Families found themselves in an unprecedented situation amid the spread of the coronavirus infection. Isolation, switching to remote work, and distance learning drastically increased the amount of time spent with the family. This had a serious *impact on parent-child relations*. The acute shortage of stability and resources combined with the degree of parents' overload predictably caused a rollback in the trend of an overly intense parental role.

Psychologists and sociologists legitimized parents' experience of burnout, and recent publications have provided grounds for a new ethic: the right to vulnerability and fragility. The accelerated transition to the distant world of the future gave rise to a number of questions around how responsible social institutions are for child-rearing. The remote format of schooling requires even greater engagement from parents engagement in the educational process, thus

The quarantine formed a significant demand for external emotional support. “Put on your own mask first” became a mantra for parents in unstable situations.

increasing inequality between families across many dimensions; parents' income, workload, and education. This demand on parents to engage more in their children's education has begun, and will continue to, trigger

resistance. Parents are already distancing themselves and finding themselves less willing and able to get involved.



A SECRET OF SUCCESSFUL PARENTING

The real situation in our world is such that, regardless of parents' desire to know, guessing how their children will live and what profession they will seek is doomed to failure. But we do know that perfectionism is undoubtedly an obsolete behavioral pattern. No-one can outstrip artificial intelligence in the perfect execution of routine tasks. At the same time, perfectionism is the main enemy of creativity, which will

be so necessary in the digital world of the future. Experts consider creativity one of the four key competencies that will help children successfully cope with the challenges of the future. The remaining three are communication, cooperation, and critical thinking. By fostering the development of these very skills, parents will give their children an obvious competitive benefit.

HOW BRANDS SHOULD WORK WITH “NEW PARENTS”

Based on our understanding of the demands of parenting today, we can give three recommendations to brands looking to appeal to parents.

It is important to help reduce parents' high levels of anxiety about the future and pay attention to “here and now”.

Help parents realize that parenting is a highly controversial, elusive, and

resource-intensive task. Promote the idea that mistakes cannot be avoided, but they can be taken less seriously.

Support parents in their right to just be parents. Let teachers teach, let doctors treat, and let parents just be nearby and help their child feel protected, loved and happy.

KEY TAKEAWAYS

- Today we are witnessing a generation with a new view of parenting who, driven by changes taking place in society, are rethinking existing attitudes. While this may be progressive, the blurring of ideas about the “right” and “wrong” aspects of child-rearing significantly increases the parenting burden and, with it, levels of anxiety among modern parents.
- Parenting is no longer a synonym for matrimony; it is becoming a more conscious step. Parents are balancing between a search for personal space, an attempt to keep up with the trends of child-rearing and treating child development as a project.
- Isolation caused by the coronavirus pandemic required parents to engage more in the educational process. This has raised questions about the role and responsibility of parents vs. institutions and caused a pushback from overloaded parents who are distancing themselves.
- Brands can help to reduce parents' anxiety by focusing on the valuable things available “here and now”. Reassure them that mistakes are natural and focus on their primary objective of loving their child.

IN THE FLOW OF CHANGE
**TALKS THAT
MATTER: THE
QUALITIES
CHILDREN LEARN
AT HOME**

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In May 2021, Ipsos interviewed people from the twenty largest countries of the world about shared values and global phenomena. In one of the questions, people were asked which are the most important things to study at home with their children. This article will reveal the top values, in the opinion of people from Russia and other countries, to instill in children. Understanding what the Russians consider most significant in upbringing will allow brands not only to communicate with their parent audience at a higher level, but they will also get an idea of the attitudes that influence the behavioral profile of young generations.

The Ipsos Global Commons Survey¹ studied the qualities and values people consider important to develop in children, rather than the practical foundations of upbringing.

In this study, the respondents, who did not necessarily have children,

were asked to choose the five most significant things to discuss at home with their children from an exhaustive list. Comparing the responses given by people from different countries allows us to gain an even better understanding of Russia's profile.

RAISING RESPONSIBLE, HARD-WORKING, AND DETERMINED PEOPLE

The three qualities of feeling a sense of responsibility (73%), hard

work (64%), and determination (58%) scored the highest values

¹ Ipsos. Global Commons Survey. Data collection: 27.04.2021-14.05.2021. N=1,000 per country. Online survey via Ipsos i-Omnibus Online Panel

and composed Russia's top 3 list of important values to instill in children. These indicated levels seen in other G20 countries included in the study.

Feeling of responsibility. China, Turkey, Indonesia, and South Korea, at 72%, were only one point behind Russia in terms of considering a feeling of responsibility as the most important value to be developed in children. In Germany, it stands at 69%. At the same time, only one in two in the large economies of the US and Japan consider this a strong necessity. This is even lower in the UK, at 37%.

Hard work. Russia (64%) is significantly ahead of the US, China, and India (all 54%) in the proportion of people who consider promoting hard work to be one of the most important aspects. This quality receives even lower evaluations in the UK (38%), Germany (29%), and Japan (24%). The countries with the lowest scores are Brazil (10%) and Italy (7%). This does not prevent countries with a lower emphasis on hard work and a feeling of responsibility in upbringing from outstripping Russia in their economic development and nominal GDP.

In Russia, learning a feeling of responsibility and hard work most often means independently (without reminders) performing tasks concerned with studies, hobby groups (doing homework, studying well, passing exams, not missing classes, and not losing possessions) and children cleaning their rooms sometimes sarcastically called "swineries" on social media by desperate parents. Parents often invest a lot of personal energy and funds in these things, and this is probably why these tasks become a popular cause of indignation on forums where they discuss the methods of "stick," "carrot", and the best ways to achieve these goals.

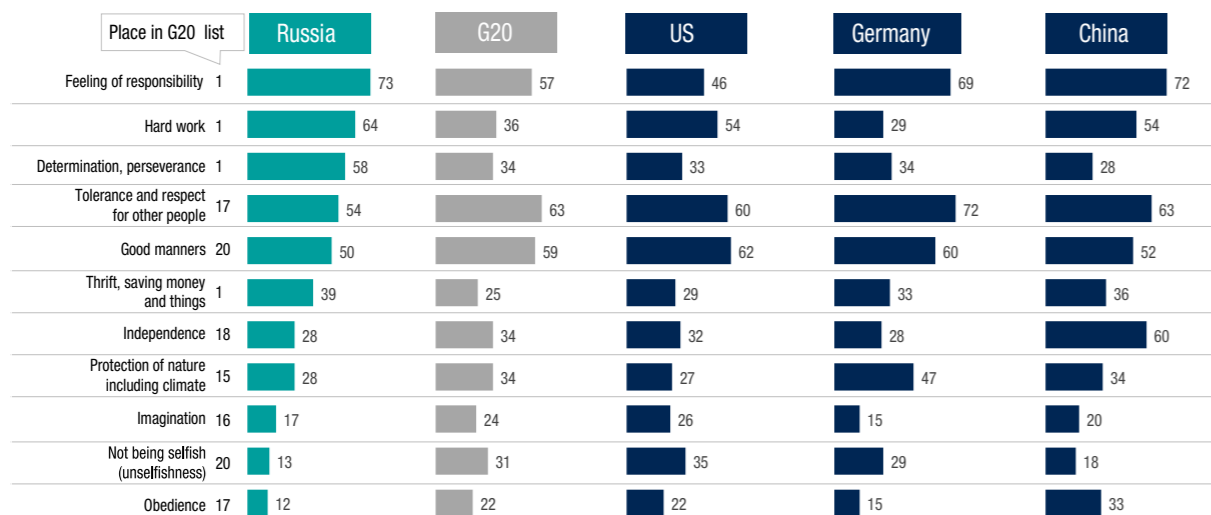
The tasks concerned with a feeling of responsibility but focused on society are more often relevant to extracurricular activities at school, hobby groups, and amateur performances where children have a feeling of responsibility for their contribution to the overall result of collective projects, rather than individual responsibility.

According to the Ipsos RusIndex study,² the share of adults over 16 years old who are ready to assume

² Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities.

Chart 1

QUALITIES TO LEARN WITH CHILDREN AT HOME



Source: Sociocultural Profile of Russia. Russians, 18-64. Online survey, Ipsos i-Say panel. Data collection: November 12-16, 2021 N=1,987

responsibility is 55%. Only 17% say they are definitely not ready to assume responsibility and would prefer to receive external guidance on what to do. The remaining 28% did not give an answer one way or the other. Meanwhile, 62% of the adults 16+ surveyed believe they can make their dreams come true if they work hard.

Determination, perseverance. The third most important quality that the Russians would like to foster with their children is determination and perseverance. The general approach

to upbringing at kindergartens and schools is more often focused on punishing mistakes, which often does not allow children to dare to advance their own initiative, or to perform a difficult task as they are afraid of a failure.

The Russian character is such that, having started something and given themselves a challenge, they must ultimately succeed. This is important both for children brought up in a culture where mistakes are condemned, and for parents who want to be proud of their children.

In Russia, six out of ten respondents attach great importance to learning determination and perseverance.

The next country where determination is considered important for children is France (48%). In Germany and the

US, only one in three selects this, and in China and Great Britain this falls to one in four. Probably the strong desire to instill determination in children is due to the fact that the Russians are more likely to break existing rules or invent bypasses to achieve a result.

TOLERANCE AND RESPECT ARE NOT TOP-PRIORITY

Learning tolerance and respect for other people, as well as good manners at home, is considered important by one in two respondents in Russia (50%).

In this indicator, Russia is last in the list of twenty. Russia's neighbors in terms of a comparable attitude to the importance of learning good manners are China (52%), Indonesia (52%), Turkey (53%), and Brazil (53%). The leader is Italy with 75%, being significantly ahead of even traditional countries of good manners such as the UK (65%) and France (56%). In the US, 62% consider it important to pay

attention to learning good manners.

The importance of learning respect for other people and tolerance in Russia takes one of the last places (54%), on a par with Japan (52%) and South Korea (53%). This is significantly lower only in India (42%). The leaders in this indicator are France (75%), Germany (72%) and the countries of South America (72%). They are followed by countries where about 60% of the respondents stress the importance of learning respect for other people at home: the US, China, Turkey, Italy, and the UK.

RAISING THE THRIFTIEST PEOPLE

The Russians are again the leaders among the G20 countries in the importance of learning thrift and saving money with children: 39% of the respondents consider it important. China has a comparable value (36%). In Germany, every third respondent (33%) considers it important for children to learn to be thrifty. Somewhat lower values are seen in the US (29%), Turkey (25%) and the UK (24%).

Many people in Russia have not yet forgotten the deficit during the

times of the USSR and Perestroika. The older generation remembers the adversities of the Great Patriotic War. Economic crises happen to Russia with amazing regularity. Therefore, the model of thrifty behavior, i.e., repairing things, finding a new intended use for old things, recycling packaging, and saving money for a rainy day means a return to schemes known since the times of the USSR for many people, but motivated by environmental concern and sustainable development. It will be easier for the Russians to switch to a

thrifty consumption model than, for example, for the residents of France or Italy, where thriftiness is seen as

a top value only by 13% and 11% respectively.

PROTECTION OF NATURE IS OUT OF FOCUS

Russian people seldom attach great importance to developing eco-friendly behavior in children. We are the leader of the five countries with the lowest result in this indicator that also includes pronounced climatic outsiders: Japan (16%), South Korea (15%), Saudi Arabia (14%), and Indonesia (13%).

Russia also has few people who consider it important to learn about the protection of nature including the climate with children (28%). Strange as it may seem, these values are comparable with the results

demonstrated in the US (27%). The leaders in this indicator are Italy (55%), France (50%), Germany (47%), India (44%), and the countries of South America (40%). In China, one in three consider it to be important now.

Currently, we can say that “nature-protecting behavior” is largely developing in Russia under the influence of information received from outside families. Half of Russian residents aged 16+ agrees with the need to change their behavior in order to improve the environment.³

INDEPENDENCE IS MORE IMPORTANT THAN OBEDIENCE

In Russia, the share of people who believe that independence should be learned with children (28%) is

over two times larger than the share of those who talk about obedience (12%). This result is quite surprising

³ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities. Statement: “I am ready to change my habits to improve the environment.” Agree – 49%, neither agree nor disagree – 33%, disagree – 18%.



for a country where the wish to “obey mom and dad” has become almost a mantra voiced when people congratulate children on their birthday from an early age. Furthermore, few teenagers will dare to voice their position if it differs from a teacher’s opinion at school. The reason is probably the need to teach children to be more independent.

Obedience. The leader in learning obedience is Brazil (45%), while the outsiders are Japan (6%), Turkey (4%) and South Korea (3%). One in three in China (33%) and one in five in the US (22%) would like to raise obedient children. In Germany, the share of people who consider it appropriate to learn obedience with children is 15% – quite similar to Russia.

Independence. Learning independence is, perhaps surprisingly, considered most important in China (60%) being significantly ahead of others in this parameter. One possible reason is that in a country where children support elderly parents, they would like to raise independent people to reduce the burden on the next generations. Other leading countries on this value are Japan and Indonesia (47% each).

In Russia, the importance of learning independence is comparable with that of Germany (28%). It is lower only in France (26%) and Turkey (25%). In the US, a nation proud of its independence, only one in three respondents (32%) consider it necessary to pay attention to this quality at home. We see the same situation in the UK.

SELFLESSNESS IS NOT A PRIORITY

Once again with Russia representing the lowest value among the G20 countries, only 13% of the public consider it important to learn not to be selfish with children. Japan and China have similarly low indicators, with 17% and 18% respectively. The leader

in this indicator is the UK: here 43% of the respondents are keen to instill unselfishness in children. Somewhat lower values are demonstrated by Italy (39%), Turkey (38%), the US (35%), France (32%), and Germany (29%).

Comparing these results with the findings of the all-Russian RusIndex study, we find that 22% of the respondents associate themselves with people who regularly donate money to charity. This behavior is less typical of people aged over 40 and

significantly higher in the age group of 16-40. This allows us to see that charity is instilled in younger people not as an imitation of their parents, but as a reaction to other external motivations.

BEING INTRINSICALLY CREATIVE

Imagination is one of the values assessed in the study in terms of importance for children’s development. In Russia, 17% include it in their most important qualities. This puts Russia in the bottom quarter on this indicator. Other countries that consider it less important to foster imagination are Germany (15%) and South Africa (16%). This value is lower only in Indonesia (5%) and Saudi Arabia (8%).

Imagination is most valuable in Japan (44%) and Turkey (40%). This indicator in the US and UK is at the

same level, at 26%. In China, one in five names imagination among important qualities.

Although the Russian respondents do not consider learning imagination a particularly important aspect of raising children, it is likely that it is largely present as a national quality and manifests itself in what we call “ingenuity” and a desire to look for potential ways to achieve one’s goal. According to the RusIndex study⁴, 47% of the Russians aged 16+ identify themselves as creative people.

⁴ Source: Ipsos. RusIndex study. H1/2021. Russians, 16+, 100k+ cities. Agreement with the statement: “I consider myself a creative person”

KEY TAKEAWAYS

- Russia stands out from the G20 countries for its desire to learn a feeling of responsibility, hard work, unselfishness, and thriftiness with children at home.
- Russia takes the last place among all the countries in respondents' interest in learning good manners with children, as well as in the desire to develop unselfish behavior. However, unselfishness as a norm – as seen in charitable activity – is actively communicated outside families and gradually starts to be adopted by younger generations.
- Independence is regarded as more important than obedience. However, learning imagination is not important.
- The focus on protection of nature is not currently one of the main priorities for learning at home. However, as the popularity of this issue is growing, the share of the Russians who are ready to pay attention to this quality in their families is likely to increase following leading European countries such as Italy, France and Germany.



IN THE FLOW OF CHANGE

THE 21ST CENTURY MAN IN RUSSIA: HOW TRADITIONAL MASCULINE ROLES ARE TRANSFORMING

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Traditional gender roles are changing, and men are dealing with the new expectations of masculinity in different ways. However, some things remain unchanged. Gender stereotypes are still embedded in our culture and pervade various spheres of public and private life. In this article, we will try to answer the following question: “What is the man of the 21st century in Russia like?”

It is often believed in our society that only women suffer from stereotypes. But this is not true. We often hear phrases such as “man should not cry,” “a man should provide for his family,”

“the man is the bread-winner,” or “a real man does not show weakness and does not ask for help.” Males, just like females, are surrounded by stereotypes.

MEN BETWEEN THE TWO WORLDS

The notion of masculinity arises not only from a set of characteristic attributes shared by many men, but also from broader social norms and the overall social environment. The concept of masculinity suggests control and domination of the “stronger” sex over the “weaker” one. This reality manifests itself both in the everyday life of citizens and in the economic, political, and social life of the state.

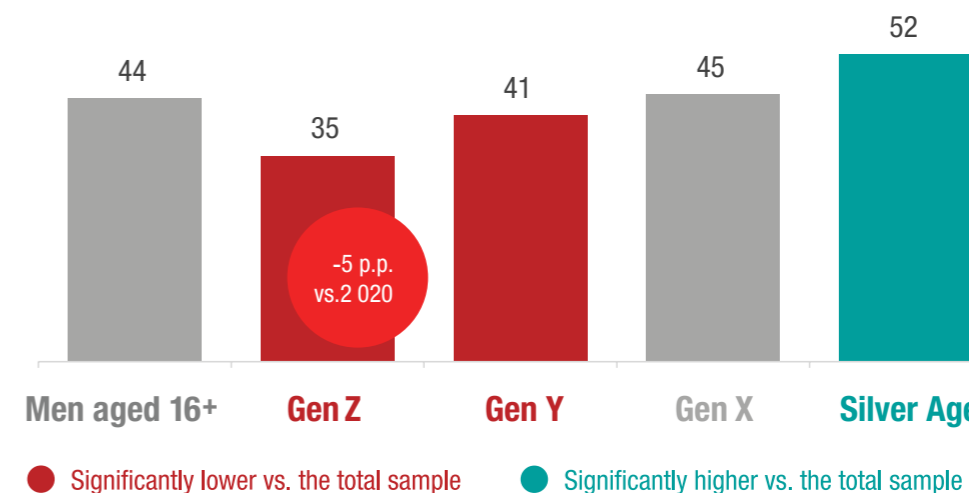
However, owing to modernizing gender roles, women now have more rights, freedoms and requirements of the opposite sex, while men have

experienced individual and global changes in traditional attitudes to masculinity in this context. German psychologist Stephan Grunewald¹ believes that many men have started identifying themselves in compliance with the expectations of their partner and society, and stopped formulating their own desires and attitudes. Such changes have led to a situation in which a so-called competing or transforming masculinity challenges the traditional perception of man as powerful and dominant, suggesting that he should be perceived primarily as a human being.

Nonetheless, many men are still guided by the traditional masculine norms and male behavioral standards: courage, determination, and the absence of weakness, for example. Almost half of men aged over 16 (44%) believe that men should never cry (Chart 1). Importantly, the most significant reduction in the share of

those who agree that men should never cry over the past year has occurred only among Generation Z. This adherence to social norms of traditional masculinity is not only a reaction to external expectations, but it also represents the prejudices concerned with the behavior of “a real man.”

Chart 1
REAL MEN NEVER CRY — NO MATTER WHAT HAPPENS
AGREEMENT WITH THE STATEMENT AMONG MEN AGED 16+ BELONGING TO DIFFERENT GENERATIONS, %



Source: Ipsos. RusIndex study. 2021/H1
Men aged 16+, cities with 100+ thousand residents

The modern man finds himself between two competing worlds: the traditional masculine ideal and the modern vision of man as a person with his own interests and characteristics, irrespective of his gender.

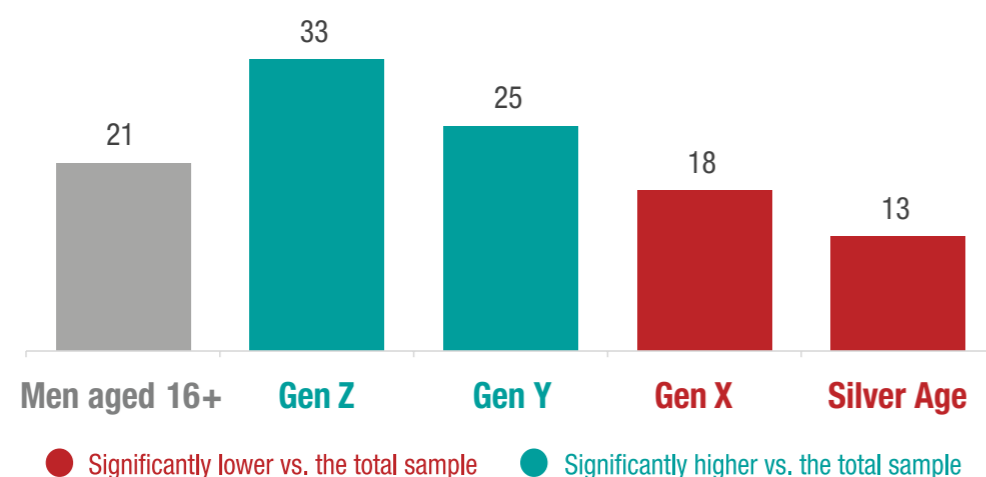
MEN IN THE GRIP OF CONTRADICTIONS

Let us try to understand the image of a modern Russian man. Today, many men see their masculinity through the lens of society, and strive to meet these expectations. This man is not accustomed to the idea of discovering his own identity, his personal traits, and his needs. The pressure of social expectations together with the absence of new clear reference points in a changing conception of

masculinity feeds a character duality in the modern man. It means that men should take care of themselves, but at the same time stay “masculine”. A study by RusIndex shows that now only one in five men strive to keep up with the latest fashion. This is highest among Generation Z, of whom one in three keep up with the fashion here (Chart 2).

Chart 2 I TRY TO KEEP UP WITH THE LATEST FASHION IN CLOTHING

AGREEMENT WITH THE STATEMENT AMONG MEN AGED 16+ BELONGING TO DIFFERENT GENERATIONS, %



Source: Ipsos. RusIndex study. 2021/H1
Men aged 16+, cities with 100+ thousand residents

Many people aged over 25 years encounter the contradiction described here in which one image of man comes into conflict with the other. This results in a situation when modern men live without a clear understanding of their gender identity. Many traditional masculine traits (for example, aggression, domination) are no longer appropriate in today’s world, but new traits have not yet formed. The modern Russian man finds himself in the difficult situation of his traditional views being hybridized, consisting of his own world view, social mindsets, opinions of other people (especially women), and a need to “keep up with the times.”

The traditional male identity gets eroded under this pressure and results in the following dualities:

- **Independence vs. need for approval**
Men strive to be independent, free, and do what they really want and love to do, but they need approval on the part of women and society.
- **Need for acceptance vs. lack of confidence**
Men want to be accepted and

loved as they are, but they are not sure that it is possible.

- **Emotionality vs. the frames of traditional mindsets**
Men are ready to be empathic and express emotions, but often they stay within the framework of the traditional gender mindsets (“head of the family,” “defender”).
- **Looking for new ways to express masculinity**
It is still important for men to be masculine, but they miss new ways to express masculinity due to the transformation of gender roles and expansion of women’s positions.
- **Resisting the trend towards men’s feminization**
Men see and realize the process of their gender’s partial “feminization”, especially in the west, but they are not ready to accept it or to follow such a trend.

The described mindsets largely reflect the Russians’ cultural identity (traditionalism, passive behavior, downcast culture) that is undergoing transformation too. Russian man is changing along with them.

DEVELOPMENT OF MASCULINITY TRENDS

What will happen to Russian men in the future? It is clear that modern men and the masculinity associated with them continue to undergo significant changes. Let us try to highlight several potential directions in which men will be developing and changing along with the emerging trends:

- **Attitudes toward their appearance** The role of self-care is significantly increasing, as it is important to look appealing and well-groomed for self esteem and professional advancement.
- **Their own wishes** Men independently choose their

profession, hobby, interests with minimum regard for the social perception of their choice.

- **Deriving pleasure from life** Men pay attention to their “self”, which is perceived as an important in order to derive pleasure from life.
- **Sharing responsibility** Men will be more deeply engaged in household chores and raising children. The trend toward sharing financial responsibilities will continue while men will preserve the status of “family breadwinner.”

- **Preserving basic masculinity traits**

Despite their transformation, the main associated positive traits (courage, bravery, heroism) will remain relevant to most men.

“Today man is a combination of several factors – he has to be able to earn money, be a good husband, attentive, devote time to children, look good, always wear stylish and fashionable clothes. The values have

changed – now being a simple worker is not prestigious and sometimes even humiliating.”

Sergey, 34 years old, Ekaterinburg

Today, brands have a good opportunity to become a direct participant in the transformation of modern men, helping them cope with uncertainty, and to find their true selves and their own place within the modernizing gender roles and Russian society in general.

KEY TAKEAWAYS

- The role and status of traditional masculinity is eroding, raising the following question: What does it mean to be a man today? The modern Russian man finds himself in a dual situation: traditional values compete with the current changes in society and gender roles.
- A reorientation of man in the context of the new masculinity can be expected within the next 5-10 years.
- In such a situation, it is important to help men find a new meaning of masculinity by promoting positive men’s values and minimizing the traditional and irrelevant perception of masculinity as dominance.



IN THE FLOW OF CHANGE

MADE IN RUSSIA: PRIDE IN THE RUSSIAN AUTOMOTIVE INDUSTRY

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New high-tech achievements are emerging in Russian civil life. The country has declared a focus on the development of both new and traditional industries, on greater industrial localization, as well as on growth in its own high-tech competencies, including the automotive industry. We wondered how Russian consumers perceive these changes, how they see Russia's potential as a producer of new civil technologies and innovations, especially in the automotive sector, and how brands should react to these changes.

Concepts such as a “need to be proud” or “national pride” have been spoken of little in Russia and are not well-developed in brand communications. However, with the current vector of country's development focused on recreating its own high-tech production facilities and competencies, as well as stimulating production localization in the most promising areas, it could be useful for marketing specialists to take this into account. It is probably high time for large industrial manufacturers, including automobile companies, to pay attention to this issue too.

The Ipsos team in Russia decided to ask the Russian consumers if

they now perceive Russia to be a manufacturer of high-tech industrial goods. To what extent are people ready to be proud of domestic technologies? How strongly do they believe in the future of Russian competencies in the automotive sector? How do such automotive industry achievements influence the image of Russia? How sought-after and useful will the use of this issue be in the communication of Russian and international brands?

In October 2021, Ipsos experts studied this little-researched issue in a qualitative syndicated community, speaking with 30 car owners from different cities of Russia.¹

¹ The Ipsos syndicated community was established in 2019 and has 300 members today: men and women aged 18-55 from 10 Russian cities. Link to a more detailed description of the research methodology

A NEED TO BE PROUD

We started by asking our participants about their overall awareness of Russia's high-tech achievements. The initial hypothesis was that there would be a low level of awareness, but that people's need to be proud of industries, including the automotive one, would be significant. And this hypothesis was verified.

The spontaneous awareness of Russia's high-tech achievements is quite fragmented, comprising the Sputnik V vaccine and medical achievements (developments for cancer, ophthalmology, exoskeletons), as well as IT with the convenience of solving everyday issues (*“it has become more convenient to live”*), the Russian developments in banking applications, and cybersecurity..

Industrial activity is mentioned quite rarely, while respondents most often name the space industry (Nord Stream) and transport (although in abstract). This conforms with the general idea that the situation in the country is changing for the better, but the pace is slow.

The tone of the survey participants'

comments changed after we showed them a selection of Russian achievements. The most inspiring ones include the MC21 aircraft, the PD-14 engine, the *Akademik Lomonosov* floating nuclear power plant, the *Arktika* nuclear icebreaker, space technologies, turbines, and the Elbrus processors. Respondents confessed that they were simply unaware of many of these inventions, and they were pleasantly surprised.

The overall nature of their statements suggests that Russian people lack awareness of domestic high-tech developments. They are pleased to see their country's engineers and companies are creating advanced products and that Russia has something to be proud of.

“They definitely make me take pride in my country! We produce trains, aircrafts, ships on our own rather than buy used vehicles in other countries. Technological development provides both new jobs and an incentive for the new generation to develop in these areas and make new breakthroughs in the future.”

Woman, 34 years old, Moscow

We should also refer to the following statements:

“That’s great – I thought that many of them are foreign-made. It’s nice that I was wrong”; “I am very pleasantly surprised... it turns out that I know very little”; “Impressive and inspiring respect.”

Some participants are more skeptical. They note that these achievements are Soviet developments or that they

are just individual projects – there are many of them, but they will never become commercialized. However, this is skepticism that reflects pain and, in a different way, also shows how important it is to those who have already lost faith to be proud of their country’s achievements.

Therefore, the clear implication is that of raising awareness and a positive context concerned with Russian technologies.

AUTOMOTIVE ACHIEVEMENTS CONTRIBUTE TO RUSSIAN PRIDE

The automotive industry discussion was more emotionally positive. These achievements are more evident, they are noticeable in people’s everyday life. First of all, people spontaneously note progress in public transport development, such as the modern Moscow electric buses, the Moscow metro train and the tremendous active construction of a road network throughout the country.

The electric buses and trains look stylish, current, and innovative. They also reflect the population’s attitude

toward e-mobility: the introduction of this transport is perceived as caring towards the Russian people.

*“It is nice and it makes me feel proud that they have started to think about environmental issues, replace gasoline buses with e-buses”
Woman. 45 years old, Moscow*

The evaluations become even more positive after being further prompted as participants were unaware of many achievements. The hydrogen Aurus and water buses, Sapsan

and Lastochka trains, drones from Yandex and Kamaz, smart roads, and Moscow’s leadership in the number of electric buses in Europe all make people take pride in their country. It shows Russia keeps up with the times and forms a positive high-tech and caring image of itself. After this, we found the number of skeptical answers decrease.

Examples of research participants’ statements:

“Russia is perceived as a more convenient and comfortable country for people”

“Russian technologies are developing very rapidly”

“It already has 700 electric buses, and Russia is the leader in this parameter”

“Now I see that the country has laid a very good foundation for the future, it is just important to accomplish all these projects without abandoning these developments for many years”

“Russia is perceived as an advanced country in technologies”

“I would like these achievements to develop and surpass their Western counterparts.”

E-MOBILITY AS THE MOST PROMISING AREA

The study determined the extent of people’s openness to various automotive innovations and their spontaneous evaluation of the wholesale introduction of automotive innovations into their life.

E-mobility is perceived as the most realistic and relevant achievement.

Our study confirms the conclusion about the Russian people’s readiness for and openness to the use of electric vehicles right now², but their evaluation of the current infrastructure, the absence of available offers for the mass market, and lack of knowledge about the e-mobility development “roadmap”³

² For example, in an article published in the 2021 Ipsos Flair issue

³ Activities to start from 2022

make them pessimistic about how long this trend will take to implement: an estimated 5-10 years.

Autonomous driving still causes apprehension and distrust. People see prospects for this only in 10-15 years, on average. With the launch of self-driving taxis in Russia as early as in 2021-2022, it is necessary to raise public awareness make available attractive offers to trial this technology.

“It sounds scary, I think it’s premature to use self-driving cars, especially taxis. I think it will become possible in about 30 years.”

Woman, 32 years old, Moscow

Hydrogen Fuel Cells. Awareness of this technology is currently the lowest. It is associated with something absolutely incomprehensible, unknown and even dangerous (i.e., with explosions). There is a need to actively raise awareness of this technology.

Although some of these technologies are unknown to a wide circle, the very fact of working on their creation in Russia is a clear source of pride.

“Thank you very much for engaging me

in this discussion. It was interesting for me to learn everything new that gives grounds for our national pride. Russia has a high scientific potential, but it is important to ensure that all developments are good for our society and contribute to our country’s prestige.”

Woman, 35 years old, Ekaterinburg

To sum up our study, we can say that pride in the high-tech achievements of our country is important to the research participants. Addressing this in communications can offer benefits to brands and make them more socially responsible, contributing to country’s economy and development. A further study of this issue will help to specify the most important aspects of presenting such information, but currently, we recommend the following:

- **For international companies**
Speak more about the existing cooperation and joint developments with Russian manufacturers and about the contribution of domestic science and engineering thinking to the creation of brand products. Also share more about production localization and the creation

of high-tech jobs, and the establishment of local high-tech production facilities and infrastructure.

- **For Russian companies**
Increase awareness of Russian achievements. It is important to emphasize their constructive role for people, science, education,

and the economy. Break the existing negative stereotypes, for example the absence of support for new domestic technologies and projects, their global focus (inapplicability to everyday life). It is necessary to focus on the practical benefits of new technologies for ordinary people.

KEY TAKEAWAYS

- Russian achievements in the automotive industry is the most promising area. As for other industries, such achievements are very sought-after, and the existing achievements already make consumers feel proud. However, current awareness is very low.
- Sharing domestic high-tech developments in communications – whether joint or the country’s own –will have a positive effect on brand image. It will also help to increase perceived social responsibility of brands with regards to their work in raising Russian economy, science, the overall development of the country, and in the creation of high-tech jobs.
- Further development of Russia’s own achievements in e-mobility and self-driving will positively influence the country’s image, be welcomed, and be a source of national pride.

THE PERSONAL ECOSYSTEM



IN THE FLOW OF CHANGE

DO GOOD. WHY RUSSIANS ENGAGE IN CHARITY

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Russian people engage in charity-giving guided by many motivations and attitudes that range from empathy to ambition. Intrinsic motivations influence the choice of the type of charity, as well as the evaluation of campaign and programme results – the number of which has been growing in recent years, including by brands.

An Ipsos study conducted in July 2021 explains what drives private charity givers, and what businesses should take into account to make their charitable campaigns successful.

The growing interest in charity in Russia, as well as the search for new socially significant semantic contexts by brands for communication with consumers prompted Ipsos researchers to study these issues in detail.

As a social phenomenon, charity does not stand still, and it transforms with changes in society. The number of assistance options and formats is growing, while those who support charitable initiatives have many new

opportunities to choose how and who to support.

During the charity study, a qualitative syndicated community,¹ the Ipsos experts interviewed 30 respondents from different cities of Russia.

The respondents engage in charity and make donations with varying frequency. Our team concentrated on drivers and barriers, motives, and attitudes towards charity, as well as recent changes.

WHY PEOPLE HELP: FROM EMPATHY TO VANITY

One of the important motives for engaging in charity is communication with like-minded people. Therefore, practices and campaigns focused on collective activities evoke a positive response. For example, the participants recall the Tea Race campaign, an event has been held for five consecutive years to support the Zhivi, Malysh Foundation. Charity givers gather in a park, drink tea, participate in a marathon, socialize, and simultaneously donate money for projects implemented by the foundation. Such activities gather people from different cities of Russia. They like the opportunity not only to make a donation, but also to socialize with like-minded people, make new acquaintances, and have a good time. In this case, people are united not only by the desire to help, but also by a common interest in sports activities, such as running.

The second important motive for those engaged in charitable activities is the opportunity to feel that you are a good person. After all, charity is a socially approved phenomenon.

People also become emotionally affected by specific stories behind donations. Targeted assistance is more motivating, as it is more trustworthy and evokes a stronger emotional response.

Often, people like to be involved in a significant event. Even more so if a large brand takes part in a campaign in collaboration with a foundation, as people want to have a hand in something large-scale and important. In this case, the driver is ambition and even vanity. Yes, it is pleasant for people to know that they have done a good deed, and they like to be thanked!

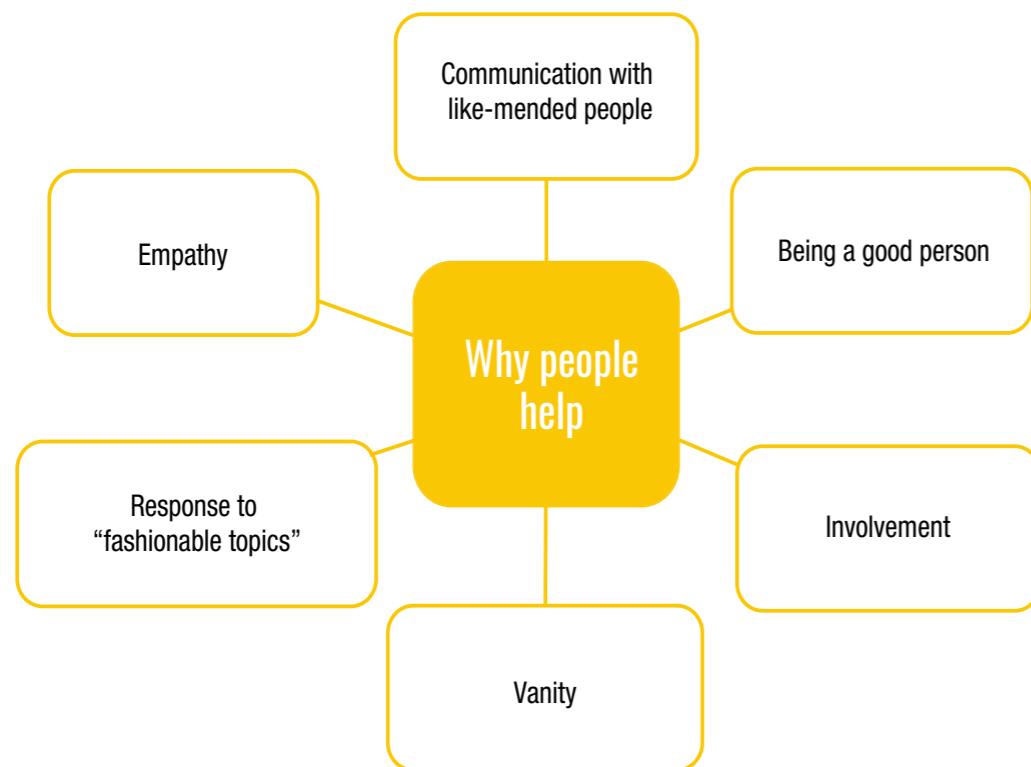
Empathy quite often becomes a driver for participation in charity. People react to their own feelings and want to help others. This often works if people have experienced a similar situation. Some people help children if they have a similar personal story, others help cancer patients having already experienced a struggle for the life and health of someone they love.

¹ The Ipsos syndicated community was established in 2019 and has 300 members today: men and women aged 18-55 years from 10 Russian cities. The topics studied within the community can be found on stories. ipsos.com

“My mom has recently died of cancer, and my dad died after two years of Parkinson’s disease. Having passed through all the “circles of hell,” now I take part in any activities dedicated to these issues: I can talk, help, take care of, transfer a small amount of money, buy medicines and create relevant videos. Besides, I have been keeping in mind the script of a movie about patients with incurable diseases for

*several months so far.”
Eleonora, 47 years old*

Even hype and fashion can become motivators. For example, when forests were on fire in Australia, social media launched many campaigns to help wild animals, and a lot of people, including younger people responded to them in order to “be trendy”.



WHO THEY HELP MORE OFTEN

Motives are not the only thing. It is also important to consider where the assistance is being directed.

People tend to help large and famous foundations and are more likely to make a donation to well-known organizations they are already familiar

with. Usually, if people active in charity, they have a specific pool of foundations, organizations, shelters or orphanages that they regularly or habitually help.

People gradually find such foundations of their own accord, such as through acquaintances and friends, or are guided by the choices of a media personality or celebrity. For example, the Konstantin Khabensky Charity Foundation and the Podari Zhizn Foundation established by Chulpan Khamatova are considered very trustworthy. These names are well-known and respected, so people are willing to donate to them.

Here, the ruling principles are the same as those that have been used in marketing for many years to promote brands along the loyalty pyramid: creating awareness and a more detailed understanding of beneficiary’s essence, acquiring one’s own interaction experience, verifying it, and forming a desire to recommend this beneficiary in one’s circle.

People like to help solving local problems, especially with a growing interest in local social issues, – just 20-30 years ago, local problems

facing the district were less important to people. Participation in charitable initiatives does not only mean through money; people can become volunteers. And when help is needed somewhere near you, this closeness makes it much more motivating to help,.

*“We mainly support local organizations that we know well and whose activities we see, as they are ours. Unfortunately, our city does not have that many shelters, one of the famous organizations is the Zoozaschita society. Its activities can be tracked on social networks: concerts, collecting food and necessary things, fundraising – they announce all campaigns.”
Lyudmila, 38 years old*

It is easy to find such organizations today; people are likely to respond to calls put out through district chats or social media.

People most actively help children and animals – this is a quite consistent trend. As for less burning issues, projects concerned with violence (people consider it important, but controversial), as well as campaigns focused on HIV, homeless people,

and migrants tend to generate less support from the public.

There are people who do not make donations at all, and often their argument is that of distrust: “I don’t believe them, so I don’t donate anything.” However, fundraising managers more often evoke a response. Furthermore, the study shows that everyone chooses their own way to help people: volunteering, “manual” help for specific organizations, and so on. It is often convenient for people to help

with products: “I bought food for a shelter, exercise books for children and took them there.” Or “I went there to assemble furniture.” Such people prefer to provide help that can be seen and touched.

As for the up-to-date ways to make a donation, people still know little about platforms and technical opportunities for fundraising. The research participants are better aware of the ways to help through sports, for example, charity running campaigns, and perceive such activities positively.

HOW TO BUILD TRUST

The main barrier to charity donations is distrust. Examples of fraudulent fundraising often discourage people from engaging in charity. There is still concern about such situations, even among people who make donations regularly. How can we overcome such a barrier?

- **Transparency.** One of the potential solutions is reporting. It is important for the participants of charitable initiatives to know “what their money was spent on.” There are people who track

the money they donate, even if not for a particularly large amount. Sometimes donors do not directly request reports, but when they receive them, their doubts disappear. Charity givers understand that their actions were not in vain.

- **Reciprocity.** People often just need a response from a foundation to demonstrate its transparency. It is enough for people to receive a report at least once or twice in a mailing list, as

this convinces participants that everything is fair, and the money is spent appropriately.

- **Gratitude.** Along with a money distribution report, it is important

for donors to receive gratitude for their support: this brings them positive emotions. Gratitude encourages them to make donations to this foundation again.

BRANDS' CHARITY

The study also explored participation of brands in charitable projects and the influence of such activities on the consumers' opinion about the company.

People often believe that brands provide help for the sake of profit, by improving their own image. Nonetheless, it is a positive story, as the company demonstrates concern in this way. This increases confidence in both the campaign and the brand. People more often trust companies that support projects with values being close to them.

If a large company participates in a charitable project, it becomes kind of protection against fraud, a guarantee that this particular foundation can be trusted. As a result, such collaborations have a positive effect on everyone; society

forms respect towards both the foundation and the company that acts in partnership with it.

“Brand’s engagement increases an audience reach and additionally contributes to the good name of such a brand. Everyone wins: the brand gets promotion and those who need help receive it. For example, APPLE with its Product Red² – the audience is huge, and everyone wins: users get a unique design, while the company gets advertising and also engages in charity.”

Artem, 21 years old

There is also another position: people believe that companies should help regardless and that this is one of their business objectives rather than a goodwill gesture.

The controversy is concerned with

² Some portion of the incomes from selling each iPhone 12 (PRODUCT)RED goes directly to the Global Fund to Fight COVID-19

engaging consumers in fundraising. People may be dissatisfied with this as they believe that businesses should donate their own money rather than collect it from customers.

Nevertheless, people more often demonstrate a positive attitude towards brands' participation in society. Finally, it is most important that a company's engagement in

People consider businesses' activity in charity as the development of humanistic ideals in society, as social responsibility.

charity contributes to emotional closeness of customers to the brand. They follow the following logic to build an emotional bond: "I am not indifferent to environmental problems, and there is a company that is not indifferent to them either. This means that the brand is closer to me." After all, people usually, even subconsciously, choose something that fits their values, including brands. This year seven in ten across the 25 markets agree that they tend to buy brands that reflect their personal

values (70%).³

This is not to say that a company's charitable activities is the main purchase driver for consumers. More likely, it creates a necessary foundation to build trust between consumers and the brand.

We are sure that these findings will help businesses be better aware when choosing formats to demonstrate the social responsibility of their brands.

The Ipsos team would like to thank the [Philanthropy periodical](#) for the impetus to write this article. The research findings are also published on the website [Philantropy.ru](#)

³ Ipsos Global Trends 2021: Aftershocks and continuity | Ipsos MORI

KEY TAKEAWAYS

- The motives for engaging in charity are very diverse. However, we can say that charity has the same driving mechanisms as marketing, including the appeal of better-known brands (awareness), storytelling, and sharing common values.
- People willingly help major and well-known foundations. Small foundations find their audience if they solve important social problems. People also pay attention to foundations that are active in their area of residence or solve local problems.
- Transparent reporting on activities, a response from a foundation, and gratitude towards donators and volunteers help to build trust.
- Brands' charity is not always perceived wholly positively. However, a strong brand acts as a guarantor of reliability for a donator.

IN THE FLOW OF CHANGE
**HOME, SWEET
HOME: THE
CHANGING ROLE
OF THE HOME
FOR MODERN
RUSSIAN
FAMILIES**

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The home is probably one of the most stable notions in culture; for centuries it has conveyed values such as comfort and safety. “My home is my castle,” we say, regardless of the type and size of our home. Russian consumers associate even a small studio apartment with a space where they can relax and be themselves. What new values and meanings does the notion of home carry for Russian consumers? And what is an ideal home for them?

CRAVING HOME-OWNERSHIP

While shared homes were popular in the mid-20th century, this concept has receded into the past. People now have the opportunity to rent apartments and many families can live separately from their parents and neighbors. This gives a sense of freedom and independence, especially when it comes to their own homes, which they can furnish according to their own preferences and needs.

According to the RusIndex study, 73% of Russians live in their own

apartments, 12% in their own houses, and 7% in rented apartments or rooms. As for their plans for the next two years, 23% say they will buy an apartment while 10% will rent one.¹ An owned apartment is definitely the more appealing option as, apart from the obvious benefit of stability, there is the possibility to customize it. Tenants can bring their own furniture, appliances, and pets without the need to agree it with a landlord.

MAXIMUM FUNCTIONALITY IN LIMITED SPACES

The small size of apartments, typically 64 sq. m on average, forces people to be as practical as possible. Often one room in their home has several different functions; a bedroom can be both a movie hall and a children’s room while a kitchen becomes not only a place to cook and eat food, but also an area to eat and work. In our RusIndex study, 47% of women and 33% of men say that the kitchen is the main room in their home.

“I like my computer desk – it is a leisure area, a creative zone and a workplace for me. It easily adapts to my needs thanks to its convenient lighting, sufficient number of sockets and free space. I try to keep my desk clean – there may be a mess around it, but the desk should always be ready to receive me.”

In a small apartment, it is important for each family member to have their personal space. People rarely have their own separate room, but having their own place at the table during lunch is a quite common. This gives a sense of control, allows them

to build personal boundaries, and creates comfort and security – the fundamental values of the home.

The desire to make an apartment as functional as possible is closely connected to the developing trends of personalization (the want to customize everything), minimalism and asceticism.

“I like it when everything is hidden in closets. For example, I don’t like to have towels hanging on the stove in my kitchen, I don’t like it when kitchen utensils are placed along the working area, I even keep my dishwashing sponge in the cupboard rather than on the sink.”

To feel comfortable in small areas, people try to free up their space as much as possible from unnecessary things and are taking a new interest in decluttering. A global Ipsos study of behavior change caused by environmental concern² shows that 31% of Russian people are now trying to buy fewer new things. Interior design items must have maximum

¹ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities. Households are interviewed about their housing conditions and plans.

² Ipsos. Climate Change + Consumer Behavior study. October 2021. Russians, 16+.

functionality, and we see a rise in clean-up and space organization services, as well as temporary storage

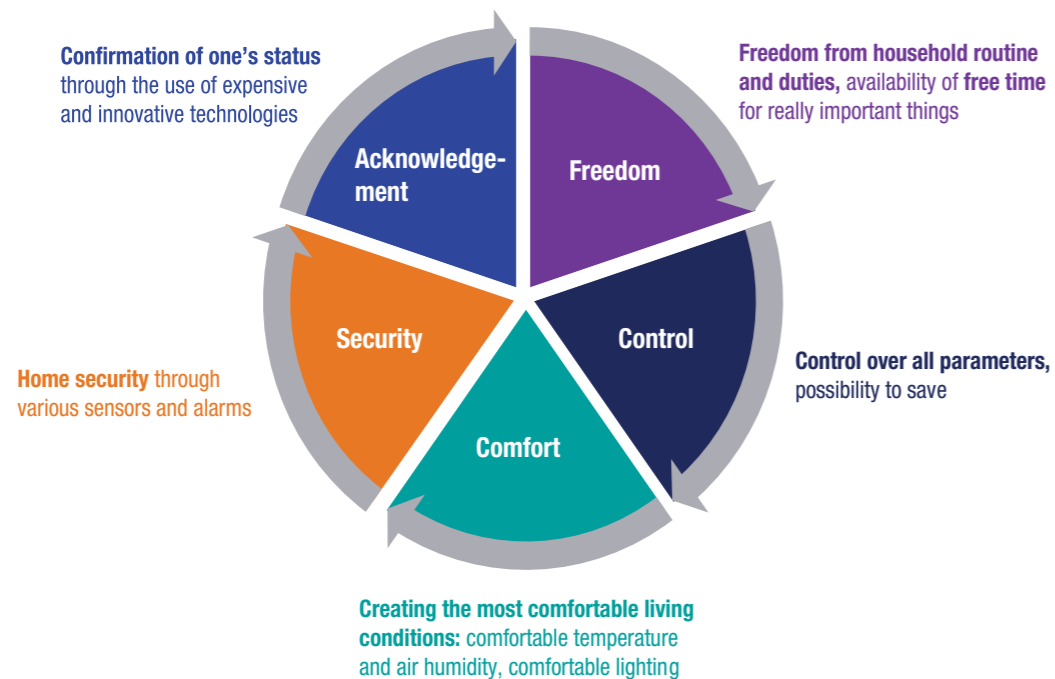
services that are needed as people live without areas such as a garage.

COMFORT AND RECREATION

Year-on-year, our homes are becoming more comfortable. For example, every tenth family has a dishwasher, one in four has a multicooker, and 14% even have an air conditioner.³ Russians' homes are becoming more functional and technologically-advanced thanks to smart appliances. One in five (22%) say that they own household

appliances with built-in Bluetooth or Wi-Fi, and even more (27%) have a TV with such features. We are seeing other appliances with these improvements starting to appear, as such 3% own washing machines with Bluetooth/Wi-Fi connections, and 2% for home theaters and vacuum Today, many household

A SMART HOME MEETS A WIDE RANGE OF MODERN AUDIENCE'S NEEDS



³ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities.

chores can be delegated to household appliances. Robot vacuum cleaners, smart household appliances that allow people to start cooking dinner when they are not at home, and

voice assistants that free up their hands, are examples of how new technological interactions are entering people's lives, and simplifying it.

Russians particularly like robot vacuum cleaners. They are called "new family members" and given names. The new home assistant purchase is often shared on social media, with online friends asked for help to come up with their name.

Appliances give people freedom from household chores so that they can have free time for family, hobbies, friends, and entertainment. Removing some of the pressure and burden of household duties helps people to keep a positive outlook.

at home⁴ and our RusIndex study tells us that 5% of Russian homes have exercise bikes.

Many Russians have libraries in their homes. Their love for paper books has not disappeared with the advent of e-books. One in four (24%) of the people interviewed in our RusIndex study have bought paper books in the past six months. The leading genres are foreign science fiction or fantasy, domestic and foreign detective stories, as well as Russian and Soviet classical prose.

Home functionality is actively expanding – the coronavirus pandemic being one of the most important reasons. Today, the home is an office, a gym, and a creative workshop. According to VCIOM, 39% of Russians say that they do sports

FROM PERSONAL TO PUBLIC

Home is the place that offers maximum privacy and security. For centuries people have been erecting imaginary and real fences to protect

their swellings from the dangers of the outside world. Behind closed doors, they can finally breathe a sigh of relief and enjoy their privacy.

⁴ Sportive Russia. VCIOM. 05.04.2021

However, the more technologies develop, the less private our homes become. The arrival of guests would normally be a rare event that people would prepare for, but now, thanks to the Internet and video communications, this has become a more frequent – albeit virtual – phenomenon. Home spaces have started to lose their privacy and the notion of “home fashion” has entered our everyday life.

The pandemic has triggered a switch to remote work and in this way shifted

the home further into the public sphere. Our RusIndex study found that, in mid-2021, 15% of employees were largely working remotely and 8% were splitting their time half and half between remote and their workplace.⁵ Communications with colleagues and clients were often limited to a formal office environment, but the pandemic created a situation where people could not always hide what is in their virtual background. The line between the private and the public sphere has become very fine.

COZY AND ECO-FRIENDLY

The pandemic has not only made the home more open to prying eyes, it also made its residents take a fresh look at their usual home routine. The more time people spend at home, the greater importance they attach to the familiar things around them. Many started renovating and actively fitting out their homes.⁶

The eco-friendliness trend that has been actively developing in recent years has influenced the homes and lives of Russian people. An Ipsos

survey shows that 41% have started to more actively save energy, 31% are reducing their water use, 27% have begun to recycle or sort waste, and 15% have changed their household appliances in the interest of the environment.⁷

As part of this growing awareness and importance for living more eco-friendly lives, consumers also pay attention to the materials used to make household goods and are actively “greening” their space. The

⁵ Ipsos. RusIndex study. 2021/Q2. Russians, 16+, 100k+ cities. .

⁶ Experts name most sought-after renovation services amid the pandemic. RBC. 08.09.2021

⁷ Ipsos. Climate Change + Consumer Behavior study. October 2021. Russians, 16+

market for indoor plants is actively growing. According to Avito, the demand for indoor plants in the winter of 2021 exceeded the level of the previous year by over 50% as homes are acquiring common ficus

plants and exotic orchids.⁸ Interest in indoor plants was also stimulated by self-isolation: walking was limited, so those who could not go to their country homes tried to bring nature into their homes.

PETS

Although Russians cannot generally boast of a large home area, apartments always have a place for a cat’s home, a dog bed, or a corner for more exotic pets. According to

the RusIndex study, 29% of Russian families have pets.⁹ Cats are most popular, living in every fifth family (23%). A pagan tradition whereby people let their cat into a new



⁸ Russians buy up indoor plants. New Retail. 25.02.2021

⁹ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities.

home first is still alive today, being preserved since the time of the ancient Slavs. People believe that doing so will invite prosperity and harmony into their home. Cats also help people to cope with stress, avoid emotional tension, and create a feeling of comfort and warmth at home.

One in ten Russian families has a dog (11%) while 7% keep more exotic pets, such as aquarium fish, turtles, guinea pigs, hamsters, rabbits, etc.

People are more often bringing pets to their homes without functional tasks such as guarding their apartment in mind – they are seen as family members. A pet is an object of unconditional love that invites caregiving and creates an emotional bond.

The home has an inverse relationship to the remaining world: the more that dynamic and stressful events occur in people's lives, the more they feel the need for a quiet space within their home. Homes allow people to restore balance when their life outside it is oversaturated with experiences and impressions. Homes allow people to recover and recharge. Homes are filled with many items that transfer our thoughts to places and events that are significant to us, or are designed in a more minimalist way when we want peace. As Russians experience restrictions with the coronavirus pandemic, it is more important it becomes for the comfort of their homes to compensate for the external stress and anxiety caused by the world around them.

KEY TAKEAWAYS

- Homes are becoming more minimalistic and functional as people try to get rid of unnecessary things and fill their homes with items that will make their lives more comfortable and their home routines easier.
- The home is not just a place to relax and recharge – it houses an entire life in miniature and is acquiring new functions: providing the space to work, do sports, or even walk. At the same time, the home is losing its privacy and becoming accessible to other people through video communications.
- When fitting out their modern home, people not only try to make it stylish and beautiful, but also choose natural elements and safe materials to feel closeness with the nature that they miss out on within their walls.

³ Ipsos Global Trends 2021: Aftershocks and continuity | Ipsos MORI

IN THE FLOW OF CHANGE

COUNTRY LIFE: DRIVERS, BARRIERS AND PROSPECTS

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IPSOS IN RUSSIA



Since the spring of 2020, the global environment has made many people change their place of residence and move to the countryside. This has not only been for reasons connected to job loss due to Covid-19, but also because lockdowns caused “comfortable distancing” in the open air. The pandemic and especially the lockdown significantly changed attitudes towards dachas (seasonal, or second homes). People wanted to escape from their four walls, spend more time in nature, and have safe contact with their families, so freedom on their own plot turned out to be a good solution. We will tell you about the changes in the Russians’ preferences for country life.

The first dachas in Russia appeared during the reign of Peter I (1682 – 1725). The word “dacha” itself originates from the verb “to give”, representing how the tsar rewarded his subjects special merits to the fatherland. According to a survey by Mail.ru¹, today more than half (52%) of the Russians have dachas or country houses in cottage settlements. The countryside property market has not only revived in the past two years – it is also experiencing an outburst of

online trade and delivery service. The value of life outside cities, especially in summer, has grown so much that there has even emerged an interest in abandoned houses.² At the same time, demand for country real estate turned out to be 49% higher in July-September 2020 vs. one year earlier and is still high in Russia. The long period of waiting for house construction after making an order fully confirms this fact.

¹ Why do Russian people need dachas? AiF. 17.06.2021

² Covid Robinsons: Russian people taking interest in abandoned village houses. Izvestia. 08.05.2020

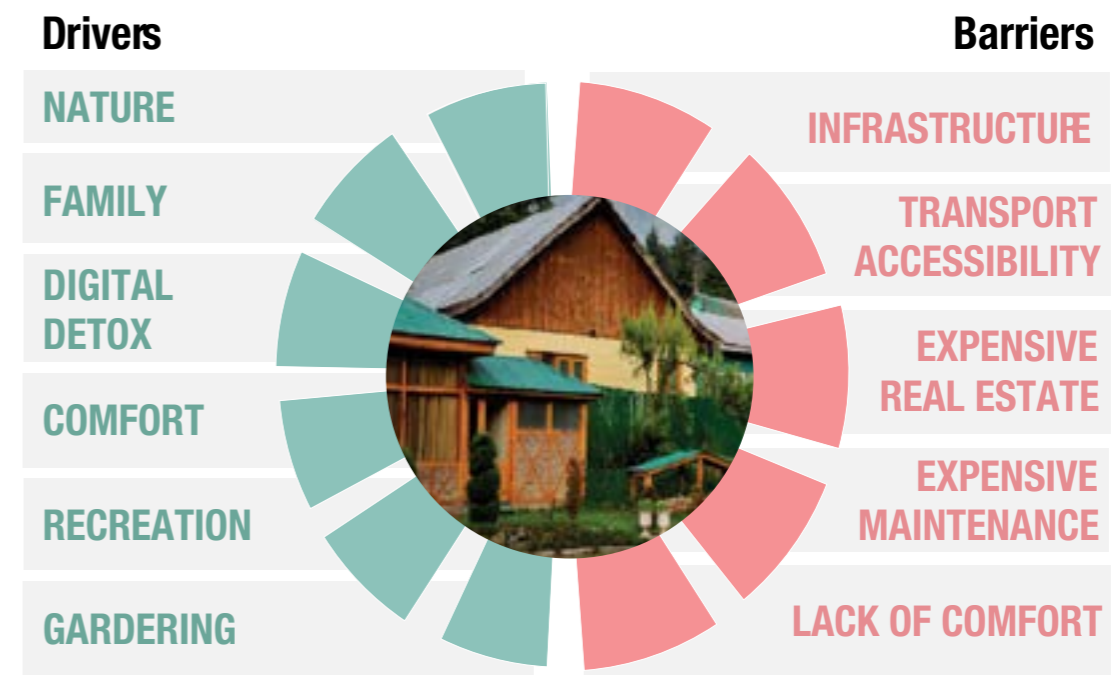
COUNTRY LIFE DRIVERS AND BARRIERS

According to an Ipsos analysis of social media discussions, the focus on digital detox, healthy lifestyles and comfortable outdoor recreation with family and friends are the main drivers of moving to the country.

These are primarily associated with an undeveloped countryside infrastructure (water supply, heating, internet, roads, hospitals, shops, schools, and leisure activities), limited mobility using public transport, and the cost of real estate.

However, several things hinder the development of this movement.

MOVING TO THE COUNTRY. DRIVERS AND BARRIERS



Source: Ipsos. Social Intelligence Analytics

Collection and analysis of social media data (over 1 million posts)

Identifying stories using text analytics (AI-based). Qualitative study of priority clusters

GROWING DEMAND FOR PROPERTY, DESPITE HIGH PRICES

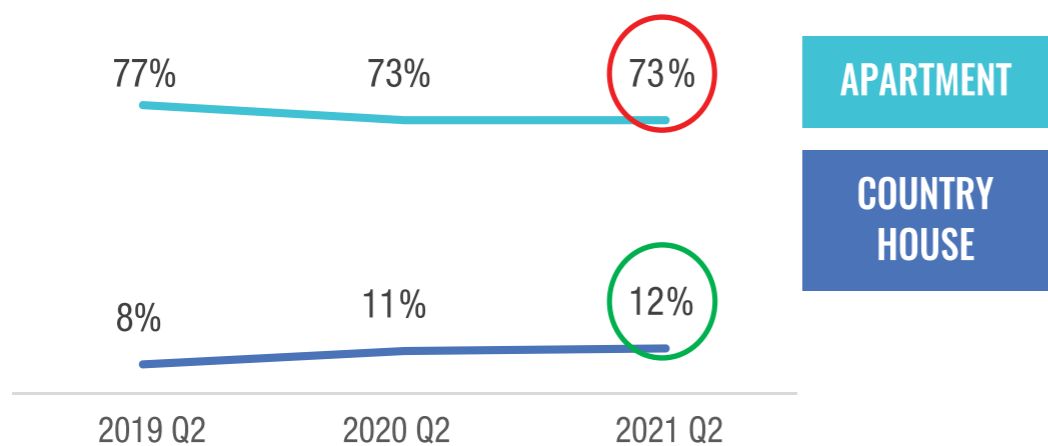
The high cost of real estate, which has already been mentioned, does not stop some people. A study by the Avito.Real Estate service³ shows that the average cost of country houses grew by 7% in Q3 2020. The high demand had the most significant effect on the cost of dachas which increased by 10% vs. 2019. Many respondents cited the coronavirus pandemic as the reason for buying a home: the share of these summer residents is 9%.⁴

Other reasons mentioned for this growth are the rural mortgage program launched in early 2020 and an opportunity to use maternity capital (state material support for families with children) for building houses on garden plots.

These dynamics is also confirmed by the findings of the Ipsos and RusIndex syndicated study (Chart 1). The share of country house owners has significantly increased since 2019, while apartment owners demonstrate an opposite trend.

Chart 1 TYPE OF RESIDENTIAL PROPERTY

% OF FULL OWNERS OF APARTMENTS AND HOUSES



Source: Ipsos. RusIndex Research. Russians, 16+, 100k+ cities.

³ Coronavirus boosts demand for country houses in Russia. RBC. 13.10.2020

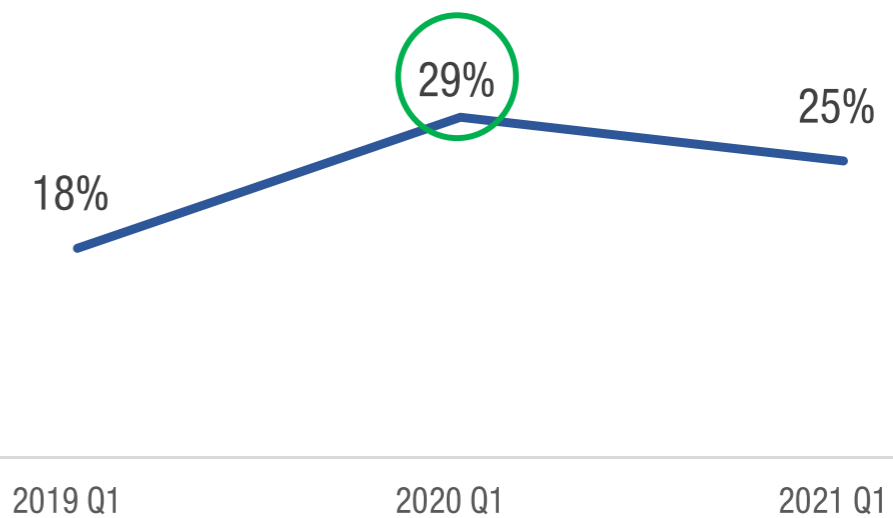
⁴ Survey: every fifth dacha owner in Russia works remotely in the summer. TASS. 14.07.2021

A similar phenomenon may be observed in the intentions of buying a house or a townhouse. An active

growth in purchases has been registered since the spring of 2020 specifically (Chart 2).

Chart 1 RESIDENTIAL PROPERTY PURCHASE

% OF PEOPLE WHO PLAN TO BUY A HOUSE, TOWNHOUSE



Source: Ipsos. RusIndex Research. Russians, 16+, plan to buy residential property within one year from the survey date; 100k+ cities.

The shortage of people's own dachas and second homes triggered an exuberant rental demand during the pandemic. According to the online ad service Avito.ru,⁵ a significant growth in the demand for the rental and purchase of country houses was

recorded all over the country amid the self-isolation regime. In April 2020, interest most significantly increased in long-term rental of cottages and townhouses: by 213.3% and 171.3% vs. the same period of 2019.

⁵ Urban environment development prospects in Russia and its adaptation to Covid-19 consequences. RANEP. 10.07.2020

FUSS IN THE BUILDING MATERIALS MARKET

Long-term living in the country made people create more comfortable living conditions for themselves, akin to what would be expected in the city. This may be a reason not only for the large-scale construction and high demand for the houses, but also the repair of existing houses. According to the Rosbalt News Agency,⁶ the most significant growth in demand throughout the country was registered for sheet materials, rolled metal and construction mixes, sawn wood, and insulation products. Experts also record a significant interest in the purchase of windows and materials for balconies, doors, and goods to repair and replace plumbing fixtures and electrical equipment in houses.

Rosstat informs that in 2020 they built almost 39 million square meters of houses, with almost a third of them were made of wood. Wall materials had been measured in statistical reports since 2009, and the area of commissioned wooden houses in 2020 became record-breaking since that time. It had grown by 520 thousand square meters vs. the previous year. The Ministry of Industry and Trade calls the demand for wooden houses in our country “unprecedented.”⁷ As a result, the cost of sawn wood doubled from April 2020 to April 2021. Global inflation affected this category of goods, and Russia was no exception. It was followed by a rise in prices for houses, as has already been mentioned.

GROWING DEMAND FOR HOME IMPROVEMENT AND COUNTRY HOUSE DECORATION GOODS

Shopping habits are changing due to changes in living conditions and moving to the country. The interest is

growing in gardening products now, triggered by trends toward sustainable eating and conscious consumption.

⁶ Demand for building materials significantly grows in Russia. Rosbalt News Agency 25.06.2021

⁷ Prices for sawn wood double – Russia facing a shortage of construction wood. News.myseldon.com. 19.05.2021

According to the analytical project Tinkoff Data,⁸ Russians spending on dacha-related products was seven times higher at the height of the

pandemic in 2020 vs. 2019. There was also high demand for practical goods: fuel briquettes, pumps, hot-water heaters, heaters, etc.

The popularity of these goods confirms that customers were equipping their country house to be alternative to their city apartment for the period of self-isolation, offering fresh air and a cozy, comfortable, well-equipped house.

A study conducted by MTS Bank⁹ shows that Russians increased spending on construction and DIY

goods by 55% during the self-isolation period from May to June 2020 vs. the same period of the previous year.

TRENDY LANDSCAPE DESIGN

It is logical that the outflow of the population from the city would trigger a growth in vegetable growing, especially spurred on by the natural nutrition trends. However, as it turns out, people may easily be fined for selling buckets of fruit from their personal farmland due to the farming regulations approved in the early 2010s. Those who might have been interested in this activity as a source of income are now switching to flower farming and English grass cultivation,

said MK editors.¹⁰

Thinking of the economy of dacha farming and its overheads, such as electricity, transport, utilities, and the wages of assistants, the cost of a vegetable summer basket will exceed 50 thousand rubles (about \$655).¹¹ This moves people from buying the practical goods described above to decorative goods. Dacha owners have become 10% more likely to buy flower and grass seeds, 25% more

⁸ Dacha choice: Russian people increase spending on goods for country houses by five times. Izvestia. 11.05.2021

⁹ Russian people's spending on apartment and dacha renovation grows by 55%. RBC. 16.07.2020

¹⁰ Restrictions on selling crops from one's fruit and vegetable garden named. MK.ru. 13.09.2021

¹¹ Vegetable economy. Is it cheaper to plant or to buy? 7dach.ru. 20.08.2019



likely to buy plant care products, and 59% more likely to acquire garden statues. Online retailers confirm similar changes in citizens' spending: this year, AliExpress Russia recorded a three-fold increase in the turnover of special seed starter kits. Biodegradable seedling bags, planting containers and root growth restraints have also become particularly popular.

Wildberries¹² notes that the sales of garden tools increased by five times and those of various garden equipment by 2.5 times in April 2021 vs. the same period of 2020. The company adds that citizens' spending on barbecue goods, i.e., braziers and skewers, was actively growing too.

¹² Russian people's spending on dachas decreases by 1.5 times. Retail.ru. 12.05.2021

However, Russians do not stop here: dacha owners have started to buy heated pools and sun loungers (three times more often), creating an environment resembling a resort. This change in the purchase behavior of dacha owners and country house residents suggests that the pandemic has significantly influenced Russian people's attitude toward country life. Now, their dacha is not only for weekends. The self-isolation regime stimulated people to engage in the improvement of their everyday life, so their focus has shifted from essential goods to comfort-class products: garden decoration goods and equipment, landscape design products, as well as renovation materials in general.

DACHA VACATION: NO ALTERNATIVE

Today, a dacha is a substitute not only for an apartment but also for a vacation spent abroad for many people. According to VCIOM,¹³ 40% of Russians spent their vacations at their dacha this summer.

This statistic is explained by the overall travel restrictions, with the opportunity to fly away an ambiguous prospect. A study by VCIOM shows

that every third respondent did not initially plan to go anywhere except their dacha due to the epidemic situation. At the same time, half of the respondents have an opportunity to spend their vacation in the country and visit the local attractions of the nearby towns. This testifies to the future development potential of the countryside infrastructure.

SWITCHING TO LOCAL RETAIL AND SERVICES

The Russian population's internal migration to the countryside stimulates shopping at local retail outlets: from food shops to stores

selling building materials and clothes in cities located near people's dachas. The same is relevant to local movie theaters, cafes, and restaurants.

Therefore, we see a trend towards developing local businesses at the expense of the capital that once was circulating in cities.

There is an inflow of urban residents' money to regional towns, small towns and villages.

Such an outflow of funds makes it possible to talk about prospects for

the uniform development of country's economy. However, it is important to keep city residents in the countryside for this purpose. All the more so as digital technologies help them to comfortably work remotely.

¹³ The summer is almost over. VCIOM. 31.08.2021

In May 2020, the Organization for Economic Co-operation and Development (OECD) published the updated report City Policy Responses summarizing the experience of responding to the pandemic by 40 cities of different countries. The report authors assume that the future should be conceptualized within the

“life with Covid-19” rather than within the “life after COVID-19” paradigm. This means, in particular, moving away from the logic of “mobility” and towards the logic of “accessibility”; of basic amenities and services where they do not exist, in this way opening new niches for businesses.

NEED FOR HIGH-QUALITY COMMUNICATIONS

An important factor for those who work or study remotely in the countryside is a stable Internet connection. In the Moscow region, the number of announcements about fast Internet access in the countryside and home Wi-Fi has begun to grow up like mushrooms. Simultaneously,

the telecom sector was keeping up with the times – Beeline, for example, invested 15.5 billion rubles¹⁴ to develop a “supernetwork” in Moscow and Moscow Region. Personal experience testifies to the fact that the Internet connection is as stable as in the city.

FAST ADAPTATION OF MARKETPLACES

Today, no one in Russia doubts that digital technologies are rapidly integrated into and successfully rooted in our country. Just a couple of years ago, we could not imagine the

delivery of goods from marketplaces or food markets to dachas. However, this phenomenon no longer surprises anyone. According to Afisha Daily¹⁵, since the late summer, it has been

¹⁴ Building a supernetwork in Moscow. Beeline.ru. 03.03.2021

¹⁵ Yandex.Market to deliver orders to dachas within one-three hours. Afisha.ru. 16.08.2021



possible to order goods on Yandex. Market to be delivered to a dacha within 1-3 hours on the same day. In May, before the summer season, the

Ozon online hypermarket launched a commercial about delivery to dachas within an hour.

WHAT'S NEXT?

We can say with confidence that the pandemic has made Russian people take a fresh look at country life. A number of factors prove that it can be quite comfortable and interesting. There are barriers, such as poor infrastructure and transport accessibility. Families with children return to the city in September if their child does not study remotely, for example. This means that the migration of this target audience during the first waves of the pandemic was temporary, with an active phase occurring in the summer. The financial aspect also prevents people from daring to live in the countryside, as in practice buying a house with a land plot and its subsequent maintenance is quite expensive.

At the same time, the relatively short-term lockdowns and non-working days caused by the pandemic have

generated a pronounced trend of living outside the city and having a private house, or even moving permanent residence to a city where the climate is warmer. The number of families who say they would like to live in a private house has grown by 1.7 million to 45.4 million (i.e., 73% of all households) in the past year.¹⁶

If we assume that this trend will continue after people demonstrate how life can be now, taking into account the focus on nature and spurred on by hyped reviews of rural bloggers, we may predict a further demand for building materials and DIY goods, gardening and decoration products, and wooden houses, and cottages. Understanding people's needs in their new status of a rural dweller will help identify new unoccupied niches in this market.

KEY TAKEAWAYS

- People's movement to their dachas, or countryside homes, during the coronavirus pandemic has caused a number of trends to develop: the focus on digital detox, healthy lifestyles, and comfortable outdoor recreation with family and friends.
- The underdeveloped countryside infrastructure, limited mobility using public transport, and the high cost of property maintenance prevent people from staying in the country on a permanent basis.
- The main tasks people face after moving to their dacha are to create the most comfortable life for their family in nature – to the same level as in the city – while combining opportunities to work, create and garden in one place.
- To create the most comfortable living conditions, dacha owners invest in their houses, renovating them and their land plots, which triggers a high demand for DIY building products. People more often buy gardening and landscaping goods.
- Large-scale internal migration contributes to local business development.

¹⁶ Russian people are tired of apartments in megalopolises. [News.myseldon.com](https://news.myseldon.com). 12.11.2021

IN THE FLOW OF CHANGE
**YOU WON'T GET
BORED. NEW
DIMENSIONS
OF AMATEUR
SPORTS**

OLGA SHEMETOVA
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Russia witnesses changes in the perception of amateur sports. Previously focused primarily on young people, now sports pick up new trends towards taking pleasure in exercises, esthetics, mental health support, social impact and sustainability. Brands can benefit from this situation by ensuring audiences' strong engagement and enhancing their social dimension.

In the history of our country, the Soviet period was a major stage of active and well-established propaganda of physical culture and sports. There was an entire system of sports clubs, swimming pools and other facilities to engage people and choose the best of them to side with professional sportspeople. As a result, the country used to repeatedly score victories at the World Championships and the Olympic Games.

This system was partially lost during the Perestroika¹, but strong sports schools in many athletic disciplines, namely – rhythmic gymnastics, figure skating, hockey and others, have survived. The Russians are still proud of their fellow citizens' victories in professional sports, however, their attitude to amateur physical culture is transforming.

FROM FOCUS ON ACHIEVEMENTS TO FOCUS ON PLEASURE

The Soviet system of mass sports was focused on choosing the best of the best for a sports career from a young age. Children got engaged in many sports at the age of five, as it was believed that it would be too late

to do that at a later stage. Coaches focused on professional sports paid attention primarily to “promising” children who could win competitions. Others received much less attention and motivation. Therefore, an entire

generation of post-Soviet people (Generation X and older individuals) grew up with the feeling that “my time has passed, I’m not made for sports.”

Now their self-image and perception of sports activities is changing: people aged 35+ years get engaged in sports.

More and more activities and coaches emerge for mass mixed-age audiences who do sports not only for the sake of victory but also for their own pleasure.

FITNESS CLUBS DID NOT BECOME ATTRACTION CENTERS AND SPORTS ENGAGEMENT DRIVERS

Fitness clubs became the first ones to focus on people who were doing sports “for themselves.” The oldest fitness club chain in Russia is World Class launched in the early 1990s. Subsequently, democratic Planeta Fitness entered the market.

Fitness clubs filled the need for physical activity for people of different ages and constitutions.

Nonetheless, now, three decades later, only 13% of the urban population aged 16+ years have fitness club membership. This share is significantly higher among people aged up to 40 years (16%).

In addition to the need to pay for long-term membership at once (12-month membership is the best option), which is unaffordable for some people or psychologically uncomfortable, fitness club customers encounter a wide range of inconveniences. First of all, it means being bound to one and the same place for a long time. Second, if their schedule or coach changes, or if they are dissatisfied with the set of activities, customers have to be content with what is left. Clubs try to diversify their programs, but customers' appetites and habituation rate outstrip management team's ability to adjust the schedule.

¹ The period of economic and political reforms in the USSR from 1985 to 1991.

“I have a lot of cards from various abandoned fitness clubs with all kinds of exercises. I didn’t manage to achieve any results or have

fun anywhere, and I didn’t like it everywhere. This situation only confirmed my opinion that sports is not for me.”²

LOOKING FOR SOMETHING NEW. ENTERTAINING AND DIVERSE

The RusIndex study findings show that 43% of the city dwellers did these or those sports in 2021.³ Therefore, there is still an enormous potential for engaging people in sports, especially

now, when healthy living trends are becoming more popular.

The RusIndex data demonstrate that the TOP5 most popular activities for the Russians by generations are:

All individuals aged 16+	Gen Z. (16-25 years)	Gen Y. (26-40 years)	Gen X. (41-55 years)	Silver Age. (55+ years)
Aerobics, fitness	Running	Aerobics, fitness	Aerobics, fitness	Home exercise machines
Runnig	Aerobics, fitness	Running	Running	Aerobics, fitness
Home exercise machines	Home exercise machines	Home exercise machines	Home exercise machines	Swimming
Swimming	Volleyball	Swimming	Swimming	Running
Yoga	Gym	Yoga	Cycling	Yoga

The growing need to do sports in such a manner that activities do not become boring and threadbare stimulates the development of new types of activity. They are often intentionally simplified versions of professional sports or dancing for

adult amateurs, e.g., squash, body ballet, aerial silks, trampoline classes, bungee fitness (exercises using a special elastic rope providing the feeling of flight), various types of yoga, exercises in hammocks, and even such an exotic option as zoo

² Source: social media users’ comments

³ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities

fitness (exercises imitating animal movements), and much more.

These options are limited only by enthusiastic coaches’ imagination.

The key idea of this new perception is to try dozens of different sports to find several “one’s own” options for pleasure.

One of the remarkable examples for this concept of free choice of activities is the Fitmost virtual project. It allows using single membership

at fitness centers, yoga and dance studios, martial arts clubs, swimming pools, gyms, etc. without being tied to a specific place and schedule.

AESTHETICS AND BEAUTY ARE IMPORTANT

Modern sports activities are not only pleasure and physical results but also aesthetics. Amateurs value both the beautiful interior of training halls and the aesthetics of sports activities, club environment and beautiful special uniforms for each type of sports. All these aspects allow them to take delight in physical activities.

“It should be beautiful. The environment turned out to be very important to me. That’s why I have nice uniforms for all my training sessions, a cool racket and squash dresses. I have an entire drawer full of sports outfits in my dresser.”⁴

Nice uniforms and aesthetic interiors also make it possible to take beautiful photos for social media.

“I was captivated by swimming thanks to the bubbles. They were appearing and disappearing so beautifully. Besides, I liked the feeling of water flowing all over my skin.”

⁴ Source: social media users’ comments

SPORTS AS A BASIS FOR A SOCIAL MIX

As the subject of gender equality is on the rise in the society, girls and women become more and more engaged in classic “non-female” sports: boxing, powerlifting and martial arts. Photos showing girls with barbells and girls wearing boxing gloves can be found more and more often on social media among “classic” posts with family members or during home cooking.

Once purely male sports studios begin to purposefully invite a female audience in response to this trend: girls wearing boxing gloves appear on advertising posters, while more appealing prices are offered.

Another manifestation of the social mix in sports is a direct statement that activities are meant for all age groups: from adolescents to the

representatives of the third age. This is how cross-age targeting manifests itself in terms of lifestyle and interests rather than age or gender.

Such interest groups create a comfortable and almost family atmosphere that often expresses itself in group members’ mutual support and additional mutual motivation. Teenagers give a burst of their energy and grace of youth to the older generation, while they are motivated by the older

generation’s admiration. It is also the first communication with adults on an equal footing for many of them.

Besides, the members of such mixed groups more efficiently master skills of communication with the representatives of other generations.

Apart from mixing by gender-and-age characteristics, of course, there is also inclusion of people with disabilities in sports. Brands also have opportunities here. For example, Coca-Cola helps the Naked Heart Foundation create inclusive workout spaces and multifunctional sports grounds. People with disabilities perform exercises next to ordinary people there.⁵

Therefore, sports activities promote empathy.

SOCIAL AND ENVIRONMENTAL ROLE OF SPORTS

Probably, now the newest and most popular format is a combination of sports and socially significant activities. There are many examples of sports-and-charity integration. They can also be found in an article from the current issue Flair Russia 2022 Do Good. Why People in Russia Engage in Charity.

Equally interesting integrations can be found in sports and environmental protection.

For example, the plogging phenomenon, a combination of jogging with picking up litter, has recently emerged in Russia. It originally came to us from Sweden. There are not

⁵ [Coca-Cola and Naked Heart Foundation open inclusive sports ground in Korolev. 25.06.2021](#)





many enthusiasts trying this new kind of sports leisure in Russia. However, there is the Plogging Russia⁶ team that tries to systemically promote this new idea. Plogging attracts brands' attention as a new environmental activity. Valio⁷ and McDonald's⁸ already organize such runs in Russia

Most often, the basis for eco-sports activities is running. In Russia, every tenth person goes for running⁹, and Generation Z chooses this type of sports especially often.

Environmental runs are quite popular: they can be low-key with participation of several hundred people and take place in one city or larger-scale involving thousands of participants from different Russian cities. One of such large-scale events is the Green Marathon that is held annually under the auspices of Sberbank's Charitable Foundation Investment to the Future. The goal of this marathon is to draw attention to environmental problems and tell the Russians how they can help solve these problems. In 2021,

⁶ Plogging rising to popularity in Moscow Region. Radio 1. 29.11.2021

⁷ Saint Petersburg residents collect almost 700 kilograms of litter during Valio plogging run. Valio.ru. 26.09.2021

⁸ McDonald's collects over 45 tons of litter all over Russia. McDonalds.ru. 22.10.201

⁹ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities

the marathon was held both offline and in a digital format: people could join the marathon using a mobile application.

Environmental bike rides are less popular, but they still take place. The RusIndex study findings show that running is about twice as popular as cycling: only 4.6% of the Russian city

dwellers claim that they have done cycling or rode a bike at least once in the past 12 months.¹⁰ In the fall of 2021, a bike ride was held in Moscow Region as part of the Car Free Day initiative. The participants switched to scooters, skateboards and bicycles to support the idea of reducing car emissions.

WITHOUT LEAVING A ROOM

The lockdowns caused by the pandemic created situations when people were unable to visit their sports clubs, and training sessions were adapted to the remote format. Now every tenth Russian uses home exercise machines. It remains to be seen how many people work on their physical shape at home without special exercise machines.

This approach is acceptable for the exercises requiring no special complex equipment or large space. For example, yoga and home training activities without bulky exercise machines have perfectly adapted to the online format

Live broadcasts with coaches were followed by recorded thematic courses

using which one can do exercises at any convenient time.

The benefits of home sports are substantial savings on club membership costs and travel time.

The drawbacks are the need for strong self-discipline and inner motivation to perform regular and long-term exercises, absence of a large free area in compact city apartments, shortage of live contacts with group members, and a decrease in performance due to the absence of group dynamics. Besides, if a coach is not nearby, they will not be able to correct the trainee, and there is a risk of performing exercises incorrectly.

¹⁰ Ipsos. RusIndex study. 2021/H1. Russians, 16+, 100k+ cities

DIGITAL ASSISTANTS

The OnLife study findings show that 14% of the respondents have sports applications in their smartphones.¹¹ The highest share is in the group of 25–34 years: every fifth respondent has an installed sports application.

Here are some interesting examples:

- **Run with Zippy:** running tracker with the Zippy interactive cat. As soon as a user takes a pause in activities, the cat starts gaining weight, falling into depression and sending its owner insistent notifications of the need to continue running.
- **Trisystems:** online platform for triathlon training sessions in the off-season period. Users can create an individual training plan with due account for athlete's features and correct this plan as they fulfill the plan and achieve intermediate milestones.

- **Nike Training Club and Nike Running Club:** high-quality recorded exercise sessions for any level of training. Exercises are performed by well-known sportspeople, and one can compete with other users.

Brands should pay attention to the trends in sports activities: mixing of genders and ages in joint groups, value of pleasure and aesthetics, and social and environmental role of sports. Sports based communications grant an opportunity not only to hold interesting campaigns with high audience engagement but also to make a contribution to people's physical and mental health improvement and to strengthen the ESG component of brand reputation.

KEY TAKEAWAYS

- Pleasure comes to the fore in fitness and sports. The key idea is to try as many activities as possible to choose several “one's own” opinions.
- Health support through sports is a continuous process requiring diversity to maintain motivation. Diversity is achieved thanks to the emergence of multiple niche sports activities. When mixed together, they engage people of different genders and ages with any level of training.
- Sports activities (first of all, running) are an excellent option for social and environmental campaigns. Brands have obtained a tool to strengthen their social or “green” agenda.

¹¹ Ipsos. OnLife study. 2021/H2

USER GUIDE



IN THE FLOW OF CHANGE

THE SHOPPING FORMATS SETTING RETAIL TRENDS

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The pandemic and its associated physical restrictions for the retail sector have led to a drastic change in purchase behavior patterns and the emergence of a new shopper who flexibly and comfortably moves between offline and online channels. What are the main features of this new shopper?

The pandemic has catalyzed the explosive development of new sales channels. The Ipsos paper Convergent Commerce¹ notes that the channel diversity is so great that the number of alphabetic letters will soon become insufficient.

- **E/M:** There is e-commerce that is rapidly turning into m-commerce where smartphones (mobiles) become the main shopping device.
- **Q:** Delivery services and marketplaces are developing q-commerce (quick commerce),

which means delivery within 30 minutes.

- **S/L:** Social commerce and livestream commerce demonstrate a very promising future.
- **V:** Banks are the leaders in v-commerce (voice assistants).

At the same time, online and offline channels are increasingly merging into a single seamless phygital environment that tries to meet the expectations of the new omnichannel shopper.



¹ Convergent Commerce. Ipsos.com. October 2021

OMNICHANNEL SHOPPER

In Russia, the strict quarantine-related restrictions of the second quarter of 2020 turned into a harsh training experiment. Large population segments had to ditch their usual shopping patterns and master online shopping. However, in the later parts of 2020, when offline stores reopened, online purchases did not show a significant decrease, showing that the new behavior patterns have settled. The dominant consumer type is now the omnichannel shopper who flexibly distributes their purchases between offline and online channels and comfortably interacts with digital technologies both at online and offline stores.

Online sales have continued to grow at double-digit rates. While in 2020, the growth in online sales was mainly due to the inflow of new customers, in 2021 the most important factor is the

growing frequency of purchases.

New shopping patterns have deeply rooted as customers saw many benefits of online shopping over offline shopping. Online players, primarily marketplaces that have been the main beneficiaries of the pandemic-related change in purchase behavior, have set a new shopping standard that entails:

- The widest possible range of products.
- Fast search and selection (a shopper takes eight minutes to make a mobile purchase, according to Ozon data).
- Mobile application ease of use.
- Fast delivery: next day or even sooner for express formats.

Retailers note that customers have become more “spoilt” and expect the benefits provided by marketplaces from all market players.

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benefits provided by marketplaces from all market players.

INDEPENDENT AND IMPATIENT SHOPPERS

Having mastered their skills interacting with online platforms and retailers' mobile applications during the pandemic, shoppers have started using digital technologies at offline stores much more willingly. We see how the largest Russian chains (Pyaterochka, Perekrestok, Auchan) are actively increasing the number of self-checkouts in their sales areas as the popularity of "scan&go" technology is growing

The reason for the consolidation of the "self-service" pattern in the sales areas of offline stores is the perceptible benefits of digital technologies:

- It is possible to make purchases at your own pace; fast or slow, i.e. comfortably.

- No dependence on other humans, whether cashiers or other shoppers.
- Absence of lines.

It is noteworthy that shoppers also prefer the most "independent" formats when it comes to delivery from online stores.² As the delivery methods are becoming more diverse, shoppers more often choose pick-up points than courier delivery. The main benefit of this independence for shoppers is a possibility to choose the time when it is convenient for them to pick up their order, which will not depend on external factors such as the courier's workload, free delivery slots, or road traffic.

THE BIOMETRIC SHOPPER³

The next level of mastering digital technologies for shoppers is biometric-assisted purchases. The largest retailers are actively introducing this technology, such as

X5 Retail Group, the largest grocery retailer in the Russian market, who announced the introduction of a biometric payment service at the Perekrestok supermarkets in 25

regions of the country.⁴ The retailer's self-checkout service was developed in partnership with Sberbank and VISA. In 2021, this service will also appear at the Pyaterochka chain. X5 Retail Group has estimated that biometric shopping will become a standard feature for millions of X5 retail shoppers in the near future.

Biometric shopping is intended to provide customers with the following benefits, which also meet the expectations of the new omnichannel shopper:

- Convenient and simple interface.
- Fast shopping.
- No need for additional devices, no need to take a card along or use your phone.

Biometric technology is becoming more popular owing in part to the Moscow Metro that has introduced its Face Pay system. According to the Metro, 1% of the passengers registered an account in it within the first days after its launch. The Metro expects that up to 15% of the

passengers will be using biometrics in three years.⁵

At the same time, the biometric technology understandably causes concern among both customers and experts. Collection, storage, transmission, and use of biometric data are not legally regulated, a consent for the biometric technology use may not be revoked. In its Face Pay system, the Moscow Metro does not even ask for consent for processing biometric personal data that should be given in writing according to law. This means that customers would not be able to control the future use of their personal biometric data.

Here innovations are in a serious conflict with societal mistrust and fear in the use of biometric data by state agencies and private companies. The fines imposed on citizens for violating quarantine-related restrictions have further exacerbated this mistrust. The introduction of biometric technologies may continue, but their development will be complicated, and conflicted shoppers will move to become new technology promoters and detractors.

² Ipsos. OnLife 2021 study. Retail Trends, Ways to Receive Online Purchases

³ Face recognition and other methods when personal biological characteristics are used for identification

⁴ Paying via biometrics becomes available in 25 regions of Russia. Malls.ru 15.06.2021

⁵ Liksutov describes how Face Pay system works in Moscow Metro. Ria.ru. 15.10.2021

NON-SPONTANEOUS SHOPPERS

Another feature of the new shopping behavior patterns is the reduction in spontaneous purchases. As they switch to online shopping, customers spend significantly less time in supermarkets, hypermarkets, and shopping centers. Online stores are focused on fast purchases, with the average time spent on the website is

six minutes, according to Ozon data, , rising to eight minutes for mobile applications. Shopping as a leisure activity has significantly reduced. Retailers are turning to social commerce, livestream commerce, and AR/VR in search of ways to stimulate spontaneous purchases.

SOCIAL COMMERCE

During the pandemic, social media has attracted larger audiences. Time spent online has increased and the role of social media in purchase behavior has moved on. Social challenges are gradually turning from an awareness and intention development channel into an independent sales channel. Facebook (now Meta) has announced its plans to build world's largest social shopping platform with the possibility to shop directly on

WhatsApp, Facebook, and Instagram. TikTok also offers the opportunity to add the "Shop Now" button to brand ads. This means that customers will be able to make purchases while watching "shoppertainment" content. In Russia, marketplaces and leading brands are using social commerce for customer conversation, moving them from brand advertising to a product card or directly to a shopping cart increasingly often.

LIVESTREAM COMMERCE

Livestream commerce first appeared in China on platforms such as Taobao, Weibo, and WeChat. Brands

around the world are now using Facebook, Instagram, TikTok, and even Zoom to ensure livestream

sales. For this purpose, Amazon is developing specialized platforms including TalkShopLive and BuyWith. Livestream sales now represent 20% of all online sales in China. In Russia, livestream is actively used

by all major marketplaces. Ozon has launched daily live broadcasts of brands and products offered on the marketplace. Customers may buy goods directly from such a stream in the "home shopping" format.

AR/VR COMMERCE

Augmented or Virtual Reality technologies may also become one of the ways to enrich online shoppers' experience. According to an Ipsos survey in February 2021, approximately 40% of Americans already used, or were ready to use, a virtual reality application to try beauty products, clothing, or furniture, as well as other interior design products. In Russia, AR/VR technologies are not currently very widespread, so

the joint project by Nomix and Bosco preparing a VR version of GUM⁶ with a possibility to rent virtual "retail outlets" seems interesting. In the online retail sector, customers do not have the opportunity to wander around the store and spontaneously choose something. A VR store may solve this problem by bringing virtual shopping experience closer to real-life experience.

NON-LOYAL SHOPPERS

The drastic changes to purchase behavior patterns has eroded customer loyalty when it comes to their habitual retailers and brands. The switch to the online format expands shopper's consideration set. According to Ozon data, a shopper views 18 products in three

categories with just one smartphone-assisted visit. At the same time, the fundamental similarity of mobile applications and online platforms used by different retailers stimulates easy customer switching between players and a growth in price competition. Online retailers claim that shoppers

⁶ Bosco and Nomix to invest over 100 mln rubles in GUM virtual reality. Forbes.ru. 11.03.2021

tend to form parallel carts on several marketplaces and easily switch between them. Now shoppers are less likely to tolerate retailers' mistakes (missing items or delayed delivery), while customer experience is becoming crucial.

Retailers face the serious challenge of maintaining closeness with customers, restoring trust and brand loyalty in the new omnichannel convergent structure. The basic part of a retailer's new system of interrelations with consumers will be rethinking the brand's DNA, its unique offer, and a re-evaluation of brand's key competencies.

To survive, the "brick and mortar" stores will have to answer the following question: which shoppers' needs cannot be met through online channels, and what will drive them to physically go to a store? For example, Magnit, the second largest food retailer in the Russian market

according to revenue, announced the opening of the first new-generation store promoting a "look&feel" concept in Moscow in 2020: it is based on creating a special shopping atmosphere thanks to a new design and product range.⁷

Brick and mortar stores may become a minority sales channel for the categories where the need to try on or test a product in action is not so important. But, they may, for example, be a convenient order pick-up channel. Most of the largest chains' brick and mortar stores have opened pick-up points during the pandemic. It seems all physical stores will face a choice in the near future: to become a fast and convenient pick-up point, or to transform into spaces that create a unique physical customer experience, allowing them to engage in brand values and form a sense of closeness to the brand.

KEY TAKEAWAYS

- The change in purchase behavior patterns has resulted in the emergence of a new omnichannel shopper who flexibly moves between purchasing via online and offline channels.
- Omnichannel shoppers can easily interact with digital technologies, which may catalyze the explosive proliferation of self-service technologies (self-checkouts, scan&go) and biometric shopping.
- The change in purchase behavior patterns has eroded customer loyalty. Market players must rethink their brand's DNA in the new conditions to retain their audience.

⁷ First new-generation Magnit opens in Moscow. Malls.ru 15.10.2020

IN THE FLOW OF CHANGE

RUSSIAN CONSUMERS AND FOOD SUPPLEMENTS: CURRENT TRENDS

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Food supplements (FSs) are still a relatively new trend for Russia. In comparison to more developed markets such as Japan, the USA and India, where their consumption reaches 50-90%, Russian consumers are just starting to familiarize themselves with various vitamin complexes. They are examining the qualities of food supplements as well as their peers' and influencers' attitudes towards them. This article describes what triggers interest in food supplements and what future this niche might have.

The interest in vitamin enrichment emerged in 1972 with the adoption of preventive health measures at the state level. At that time, the emphasis was on increasing the amount of vitamin C in citizens' diets to counterbalance the deficiency caused by the absence of year-round access to fruit and vegetables. Later, in 2008, as Russia noticed a deficiency in vitamins B, C, E, and D among the population, the state increased recommended dietary allowances for these vitamins and became concerned about the micronutrient value of products consumed by the population.¹ Now it is possible to replenish deficient elements using a

wide range of dietary supplements. But this is not the only reason for taking food supplements.

The food supplements segment has been growing in both physical and monetary terms in the past few years. This growth was triggered by pharmaceutical giants becoming interested in food supplements. The niche, already developed in western and eastern countries began to form in Russia as well. So, who is the target audience for this booming industry? What stimulated consumers to take various types of vitamins and food supplements?

TARGET AUDIENCE FOR FOOD SUPPLEMENTS

Today, the core consumers of food supplements are middle-aged and older women who are active, fit to work, and taking care of themselves in different ways. Some of them are focused on leading an active life and maintaining energy for everyday duties

and activities. Others concentrate on maintaining harmony and balance in all areas of their life. Another group seeks to preserve and maintain their attractiveness and beauty. Food supplements can actively support in all these areas.

The downward trend in the traditional notions of femininity² and masculinity in Russia suggests that the current, predominantly female, target audience will be “diluted” by young men taking care of themselves.

FOOD SUPPLEMENTS IN RUSSIAN CONSUMERS' LIVES

Regional factors

The climatic conditions of the northern regions where Russia is mostly located, with its low thermal insulation, in addition to factors such as the economic recession and high rates of depression among the population mean that the population – especially women, who are the main consumers of OTC medicines and supplements – look for ways to improve their condition. This implies not only enriching their diet with

vitamins, but also relieving stress factors and improving energy and performance. Generally, in Russia, immune-boosting supplements have topped the list of consumed food supplements during the past two years of the pandemic.³

Wellbeing

More and more Russians of the “Silver Age” generation (55+) who play a significant role in the country's economic and demographic

¹ Vitamin C enrichment or vitamin and mineral complexes? Medkontakt. 12.05.2016

² Women's Beauty and New Victorian Era. Ipsos Flair Russia. 2021

³ Ipsos. RusIndex Research (HealthIndex). 2021/Q2. Russians, 16+, 100k+ cities

development want to maintain their health and abilities for a longer time. Compared to other generations, they are most motivated to lead a healthy life and regularly undergo medical examinations.⁴

The findings of a 2021 Ipsos Global Advisor survey show that 85% of Russians say that they consider their mental and physical health to be equally important (above the global country average of 79%).⁵ Emotional comfort is an important factor in maintaining mental health, and women seek this through, among other things, food supplements; for example, vitamin and mineral complexes for beauty, body purification or weight loss, depending on their needs. Sedative medicines also play an important role

Food supplements based on natural ingredients primarily give consumers a sense of safety.

This fear makes consumers prefer “mild-acting” products and medicines, while food supplements are perceived as preventive agents, or products with a more delicate mechanism of action. Long-term and “natural” product

in wellbeing, particular in pandemic conditions which generate high levels of anxiety.

Food supplements and Russian “folk remedies”

The typical cultural approach to health and beauty care taken by Russian women is a popular method of self-care and treatment at home. The traditional act of obtaining natural medicinal extracts from plants have become the foundation for large domestic beauty brands and pharmaceutical products. This essentially packages ready-made folk formulas in convenient product formats for modern women. The fear of long-term side effects caused by synthetic products is a common concern.

courses enable people to work with a future outlook, i.e., preventively.

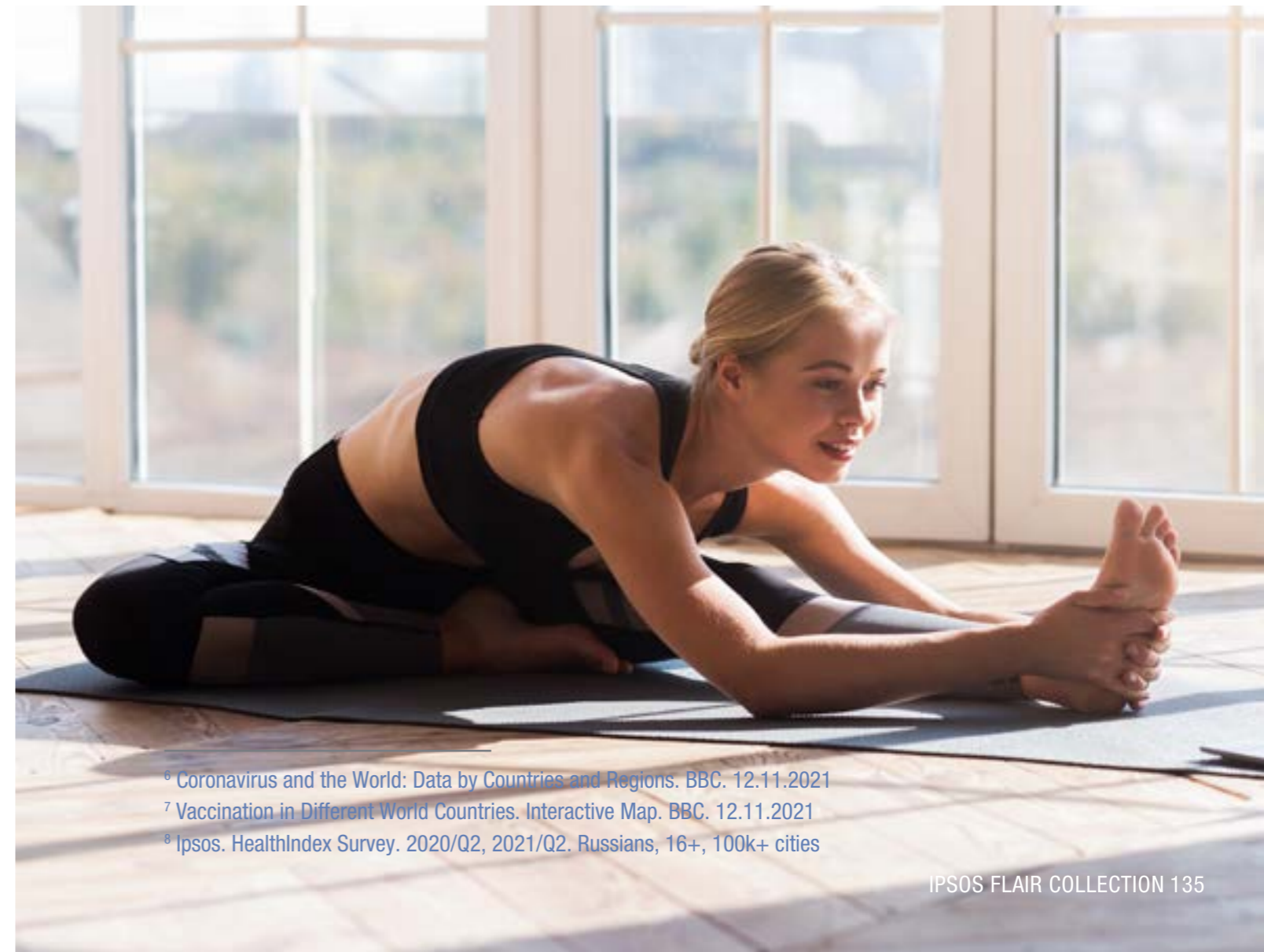
Pharmaceutical companies are responding to market demands for more “natural” products and creating

umbrella brands to meet consumer needs. They primarily focus on anti-cold medicines, sedatives, vision protection, gastrointestinal health products, and so on.

Immune system reinforcement is not a seasonal trend anymore

Russia is one of the top five countries suffering the highest Covid-19 mortality rates⁶ while vaccination coverage is still low.⁷ In this way, the need for immune system reinforcement will accompany pandemic peaks and work within

the framework of the preventive healthcare approach during off-peak periods. Russians are visiting doctors less often during the pandemic as health professionals are too busy, and many people are afraid to visit hospitals because of a possibility of catching the infection. Self-treatment is a more common approach than regular doctor visits. This is where immune-boosting preventive products come into play.⁸ Unlike constantly emerging new medicines, natural products do not lose their relevance.



⁶ Coronavirus and the World: Data by Countries and Regions. BBC. 12.11.2021

⁷ Vaccination in Different World Countries. Interactive Map. BBC. 12.11.2021

⁸ Ipsos. HealthIndex Survey. 2020/Q2, 2021/Q2. Russians, 16+, 100k+ cities

⁴ Ipsos. RusIndex Research (HealthIndex). 2021/Q1. Russians, 16+, 100k+ cities

⁵ Ipsos. World Mental Health Day 2021: A Global Advisor Survey. October 2021. Base: 21,513 online adults in 30 countries, including Russia

THE FUTURE OF FOOD SUPPLEMENTS

The emergence of food supplements outside pharmacies is new to Russian consumers, but it is beginning to dispel the popular misconception that food supplements are medicines. Clear differentiation between food supplements and medicines makes it possible to take a clearer look at the functions of these products and simultaneously increase their availability.

New product formats may appear thanks to the development of other product areas. One of the articles in our previous Ipsos Flair Russia 2021 issue predicted the release of vitamin complexes as electronic vaporizers by analogy with inhalers.⁹ It remains

highly possible due to the increasing popularity of evaporative systems.

One may expect that, owing to increasing health concerns¹⁰, more people will be taking a conscious approach to food supplements and undergoing examinations before they start taking these products. An evolving personified approach may turn into the development of an individual “single magic pill” formula that will simultaneously act in all desired areas. Personalized formulas already exist in the beauty market, for example the OpenFace personalized beauty products. It is plausible that vitamins could use the same approach as well.

KEY TAKEAWAYS

- Traditional and natural approaches to health and beauty care are not their relevance in Russia, instead they are adapting and fitting to new trends such as food supplements. This is also relevant to immune system reinforcement amid the pandemic, personal care, mental health, and so on.
- “Packaged” or “ready-made” natural products offer a sense of safety that many people are craving today. It allows modern women to find traditional “folk remedies” in up-to-date and convenient product formats.
- The future development of food supplements may include new product formats such as inhaled options, and personalized formulas.

⁹ Past, Present and Future of the Nicotine Category. Ipsos Flair Russia. 2021

¹⁰ Ipsos Global Trends 2021: Aftershocks and continuity | Ipsos MORI

IN THE FLOW OF CHANGE

MODERN TRENDS IN THE GAME. RUSSIAN GAMER'S INNER WORLD

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In Russia, video gamers have often been perceived as people wasting their time on an idle and non-serious activity for a long time. However, the situation is gradually changing under the influence of esports news. In October 2021, social and mass media were discussing a historic event; the Russian Team Spirit team won the Dota 2 International World Championship to receive a prize of \$18,000,000. The term “millionaire gamer” emerged, and many people started wondering whether computer games were really such a waste of time. The development of esports, the penetration of games into modern pop culture, and emerging metaverses are nothing but engagement of video game fans and the general public. The article explains Russians’ behavior patterns in the reality of video games, as brands have to further develop interaction with their consumers both in the real world and in the virtual one.

Game universes can transfer us to another reality. They allow us to try on a new role, become heroes, and break away from our sometimes boring reality.

However, from looking at literature and movies, we know that people are not only interested in science fiction

and fantasy but also in the world they are living today. They are also not indifferent to the past. The most fascinating plots related to our current reality or a part of our history are stories associated with our culture, perceptions of good and evil, who is an enemy and who is a friend.

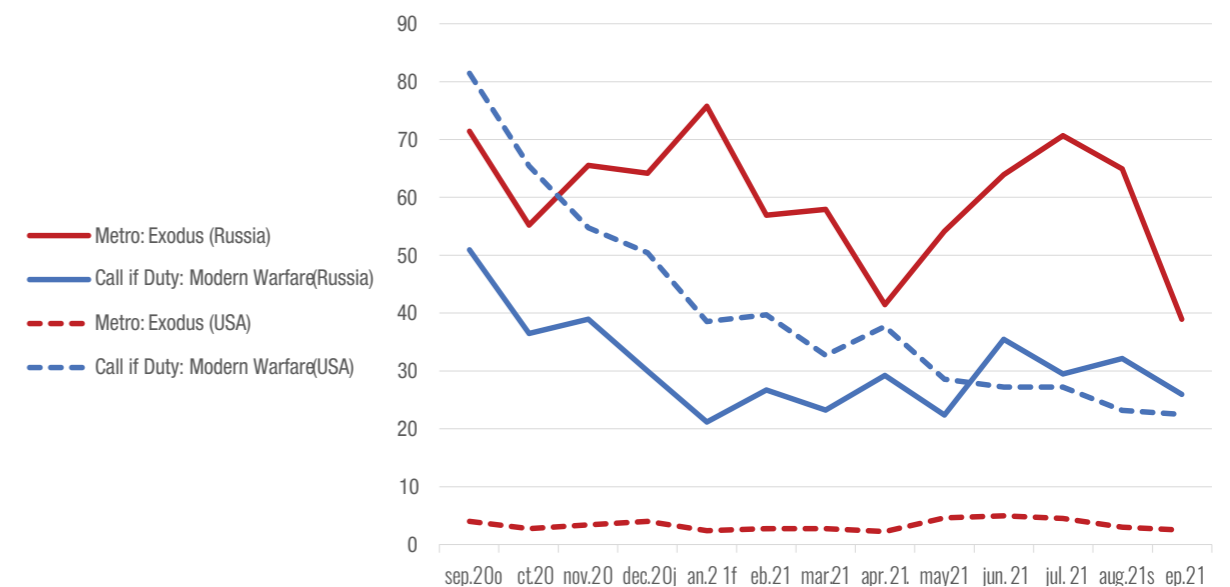
NOT ONLY SCI-FI AND FANTASY

Russian gamers are no exception. Although they spend their time in a comfortable and thrilling way both in completely fantasy worlds and hypothetical worlds found in the cultural contexts of other countries, they are proud of their history and buy related products with great interest.

The example below illustrates the difference in interest toward products from a universe where the main protagonists are typically American (Call of Duty: Modern Warfare) and conventionally Russian characters (Metro: Exodus), depending on the sales market.

COMPARISON OF THE NUMBER OF GAME SEARCH QUERIES

BY COUNTRIES NORMALIZED TO 100%

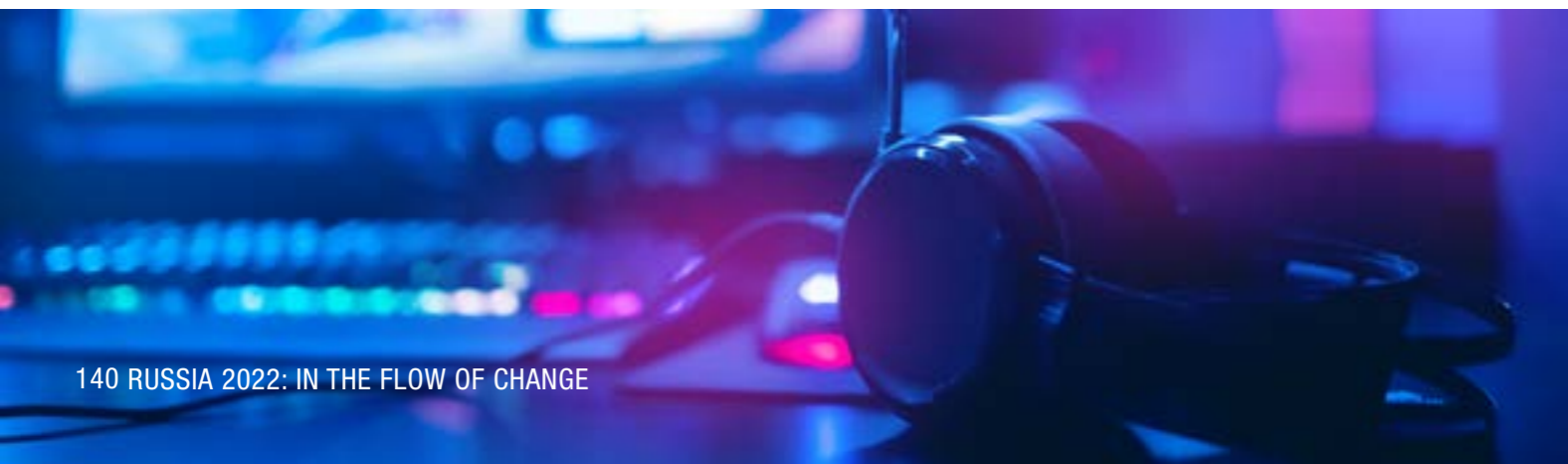


Source: Google Trends

SHORTAGE OF LOCAL CULTURE CODES

Of course, no game is alike, and there are differences in promotion campaigns that support game

launches. It is understandable that one of the world’s most popular franchises can still generate less



interest than a local product filled with characters and cultural codes relevant to a specific region.

Russian players are deprived in this sense. Being patriots of their homeland or at least admirers of their history and culture, they very rarely have a chance to immerse themselves in a game world that is close to them as the number of relevant products is really limited.

This unmet need is mainly due to economic factors. The Russian market covers about 2% of the global market, while the European market is 18%, the US market is 24%, and the Asian

market, 50%. At the same time, there are local developers in Russia, such as Playrix, a company with a turnover exceeding the entire Russian video game market and one of world's TOP3 mobile game developers. However, they are not focused on creating games with cultural themes that are close to the Russian players as the key source of their potential income is outside Russia.

As the economic situation is unlikely to change any time soon, some Russian players will continue to miss out on stories connected with their homeland for a while still.

THE RUSSIAN GAMER'S IMAGE ABROAD: "EMOTIONAL TOXIC"

The term "toxic" or "toxic gamer" in the video game environment refers to players who demonstrate obvious asocial or negative behavior. Examples are bullying other players, provocations ("trolling"), and impeding team play (playing for one's own benefit rather than common benefit of all team members).

For many years, the collective image of the Russian gamers, as seen from abroad, has been negative. Foreigners consider the Russians to be toxic gamers who explicitly express negative emotions and turn the peaceful environment in online games into a boiling cauldron of conflicts, disputes, and recriminations.

There are cases when game developers even created special online game servers only for Russian-speaking players (one of the best examples is World of Warcraft

However, toxicity does not emerge on its own. It has specific causes.

GAMING IS SERIOUS BUSINESS

It may sound paradoxical, but this pronounced gamer toxicity is based on positive reasons determined both by peculiarities of the Russian character and the current trend toward individualism.

One of these reasons is strong emotional engagement in any business, and games are no exception. For the Russian gamers, the game is a personal and serious matter rather than just some light entertainment occupying a few hours of their week. Deep immersion in the process and a sense of individual responsibility for what is happening are often clearly expressed by Russian gamers. If something goes wrong, they perceive it as their own failure or downfall. The habit of spontaneously sharing emotions is passed down from generation to generation as a cultural feature of the nation. This does not

allow them to keep even negative feelings and emotions inside – all teammates should know about them!

The serious attitude toward gaming is also reinforced by strong exactingness – not only relating to oneself but also towards others. The Russian gamers strive to be the best at what they do and constantly improve their game skills. They expect the same attitude from other players. If others do not meet these expectations, Russian gamers decide to explain and teach. This may be misplaced, or unwelcome.

VICTORY AT ALL COSTS

Another important feature is the desire to win at all costs. Often, this is the reason why the Russian gamers start playing online games, as here they can find a lot of opportunities for personal victories without facing the multiple social restrictions and conventions present in their real lives.

Gamers from other countries prefer to initially study the rules and information then enter into a battle, while Russians most likely do exactly the opposite.

Another cause of toxicity is that the Russians usually do not read instructions. Consequently, they will likely fail, especially in challenging

In Russia, game chats and communities are not regulated by law. A generally accepted culture of communication has not been formed on Runet or in the video game environment yet, so Russian gamers sometimes seek victory using any methods, even if this triggers the disapproval of foreign gamers.

games and new game locations. Of course, they then express indignation about the outcome.

GAMING AS PERSONAL DEVELOPMENT

Many Russian gamers perceive this activity as a method of personal development, improving oneself and their personal achievements – something that is an important part of the Russian mindset. They strongly influence both self-esteem and the perception of a person within

their social circle and in society. Many Russians ask themselves what they have done and what they have achieved. Even such a seemingly insignificant fact as game victories can raise a person's status, at least in their own perception. In the videogame environment, such

achievements often form a gamer's positive reputation.

It is important for companies to take this into account, and understand broader perceptions and behaviors of players because it can provide a good channel for promoting products. As the world in video games is a projection of the real world in one form or another, it is appropriate for the advertising of many products across categories to enter. Brands focused on the Russian market should consider traditional advertising and product placement in movies and in games that are popular and held in

good regard. However, it is necessary to consider the specific behaviors and interests of Russian gamers and seamlessly fit products into a story and game mechanics.

Some brands have already started to master this approach. A good example is the product placement of the Monster energy drink in Death Stranding (2019) from the Japanese Kojima Productions studio. The product naturally fits into the game mechanics as it serves as a useful in-game item that restores character's health.



KEY TAKEAWAYS

- There is an unmet need for games based on Russian history and culture.
- Russian gamers are characterized by strong emotional engagement in any business – including gaming.
- Russian gamers' perceived toxicity is counter-intuitively based on positive reasons that relate to the Russian character and the current trend towards individualism.
- Brands focused on the Russian market and considering product placement in games should primarily pay attention to games with the Russian specifics.



10 BETS

HOW WILL THE NEW WORLD AFFECT US?

“Flair” means “intuition” and “foresight.” Traditionally, at the end of each Flair Russia collection, we try to look a few years ahead. Considering the profile of the Russian mentality through the prism of the transition to a new world, we invite you to think with us how and what features of the Russian character will change?

STRENGTHS

- **Savvy**
Under the influence of the new world, ingenuity manifested itself even brighter. In a non-linear and incomprehensible world, its demand will continue to grow.
- **Risk avoidance**
A fragile world, in which one wrong move threatens to destroy the entire system, requires even more careful consideration of risks. Safety and prevention come first.

- **Great Idea**
Strengthening the local will continue. The focus is on “strengthening the roots”, on strengthening autonomy as a means of reducing risks in the event of a collapse of global systems.
- **Traditional**
Traditions are another way to reduce anxiety. Whether we are talking about national, intra-family or corporate traditions, they are a good opportunity to give a person a foothold. It can be both established traditions and new ones that replace them as generations change.
- **Fatalism**
Unexpected and disproportionate reactions, meaningless and illogical responses, which the incomprehensible non-linear world brings with it, will increase

fatal moods among at least a part of the population.

- **Heterogeneity**
The heterogeneity of the circle of communication: a multi-age, multinational environment or communication with people of different beliefs - expands the picture of the human world, promotes openness of thinking, stimulates ingenuity and creativity. Migration, economic, labor and climatic will contribute to the expansion of the heterogeneity of society in Russia.

WEAKNESSES

- **Collectivism**
In a world of fragility and anxiety, full of unexpected reactions and decisions dictated by obscure logic, the individualization of society will only grow.
- **Passivity**
The new world continues to drive a person out of his comfort zone, force him to move more actively and make attempts to adapt to a new environment.

- **Life is not according to the rules**
At first glance, the meaning of the new rules of the new world may not always be obvious. However, continued digitalization will minimize the opportunities for living outside the rules. At the same time, following the rules reduces anxiety and the fragility of existence in the new world.
- **Directness**
In a fragile and anxious world, people also become more anxious and vulnerable. The way to reduce this anxiety is to communicate more thoughtfully, empathically, including less judgment of others, because in a non-linear and incomprehensible new world, the division into “right” and “wrong” is no longer so obvious.

SONG

“THE HEART”

In November 2021, the Birchpunk group and Vitaly Albatross, the rapper, presented a new rap video¹ for the song “The Heart”. The lyrics mix Russian and English texts.

It focuses on the technological future of the Russian province and why “all the technologies never be able to substitute a Russian guy”...

**The Heart is our special pace and unique tone
Mothers have hearts, but motherboards don't.
We will soon become body-independent
But the machine is not capable to fall in love, despite it wants.
The heart is our Achilles' heel, 'cause not a joy or dream
Can happen without its beat.**

49% of Russians
always strive
to express their
individuality

Ipsos. RusIndex Survey. 2021/H1

Base: Russians 16+, cities with population 100 thousand+

¹ The Heart // Youtube.com

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GAME CHANGERS

