

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!