

TREND VISION 2022

WHAT WAY TO GO?

Special issue of Ipsos trends review with a focus on the younger generation of 16-25 year olds

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Trend Vision 2022



What way to go?

Our new trend report Trend Vision 2022 this year comes out at a time when the fragmentation, anxiety and fragility of the world around us again reminded of ourselves. Russia is again at the epicenter of change.

Despite the upheavals, people continue to have needs for food and clothing, security, health and communication. They follow their social roles, adapting their habitual routines to new situations.

We see these changes in Ipsos research results and open data. We scan the horizon and show our readers the bright signals of change around you.

In the new issue of Trend Vision 2022, we have focused on zoomers, the young generation of 16-25 years old, entering the active phase of life.

This is a special edition of Trend Vision. For the first time, we invited to work together on it schoolchildren of 10-11 grades, who made it to the finals of the Higher School of Economics' contest of research projects for the 2021-2022 academic year (profiles: sociology, psychology, entrepreneurship). Also, for the first time, we invited to work with us sociology students who studied at our Ipsos School in summer 2022.

In total, more than three dozen of young researchers from Moscow and Russian regions participated in the work on Trend Vision 2022. Thus, we were not only able to better understand the lifestyle of zoomers, but also passed on the basics of the researcher profession to those who are just starting their professional path. For Ipsos as a leader in the MR field, this is an important mission and an important role.

We hope that the findings of Trend Vision 2022 will provide a foothold and guide for brands making decisions to adapt their products, services and communications to the needs of the younger generation in these turbulent times.

4FUTURES –

is a foresight approach that helps looking at how things can possibly go over a long horizon of 5-10 years through the prism of multidirectional scenarios: growth, constraint, collapse and transformation.

GROWTH



TRANSFORMATION



CONSTRAINT



COLLAPSE



In this issue of Trend Vision 2022, we offer you our vision of possible scenarios for the development of events on the topics Education, Finance, Food, Retail and Communications.

To do this, we used the 4FUTURES foresight approach and held one working session on each topic with the participation of Ipsos experts and young researchers involved in the project – sociology students and high school students specializing in sociology, psychology and entrepreneurship.

The foresight approach is a deep strategic study of future scenarios based on the trends and signals that we are seeing today. Scenarios are variants of a realistic development of events on the horizon of 5-10 years. And this horizon is much closer than it might seem.

Foresight helps to see the potential development of events from different angles and quickly respond to changes. The GROWTH scenario immerses us in what is already growing and can grow further. In the CONSTRAINT scenario, we look at changing perspectives due to emerging barriers. The focus of the COLLAPSE is the impact of irreconcilable contradictions and conflicts of interest. And finally, in the TRANSFORMATION scenario, we think about the hardly imaginable and incredible changes that could happen.

We would like to share with you the brief basic scenarios that we have obtained. We supplemented the 4FUTURES scenarios with artifacts of the future that immerse us in the possible development of events and help fill it with vivid emotions.

We hope that this will give you a starting point for further thinking about the future of your sector and your brands. We invite you to continue developing and deepening baseline scenarios beyond the scope of this review.

DATA SOURCES

The findings of the annual Trend Vision trend review are based on Ipsos research.

Also, the review additionally used data from government statistics of the Russian Federation, publications in the media and other data available in the public access.

RUSINDEX

Largest Russian national research about consumers, goods, services and media.

In the first wave of 2021 added the block “Monitoring the adoption of innovations”.

Methodology

- Russians 16+;
- Russian cities with a population 100 000+;
- Quarterly online survey;
- ~~More than 20,000~~ 20,000 respondents per year.

ONLIFE

A detailed study of the behavior of Russians on the Internet.

Methodology

- Internet users 16+ years old;
- Weekly Internet audience using 3 or more types of online services;
- Online survey twice a year;
- 5,000 respondents per year.

[More details](#)

NEW REALITY

Monitoring of the economic crisis allows our clients to see how the population reacts to the current economic reality.

Methodology

- Frequency: Monthly/quarterly;
- Geography: city-millionaires of Russia;
- Universe: respondents 18-45 years old;
- Sample: 1000 people;

[More details](#)

Social Intelligence Analytics

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

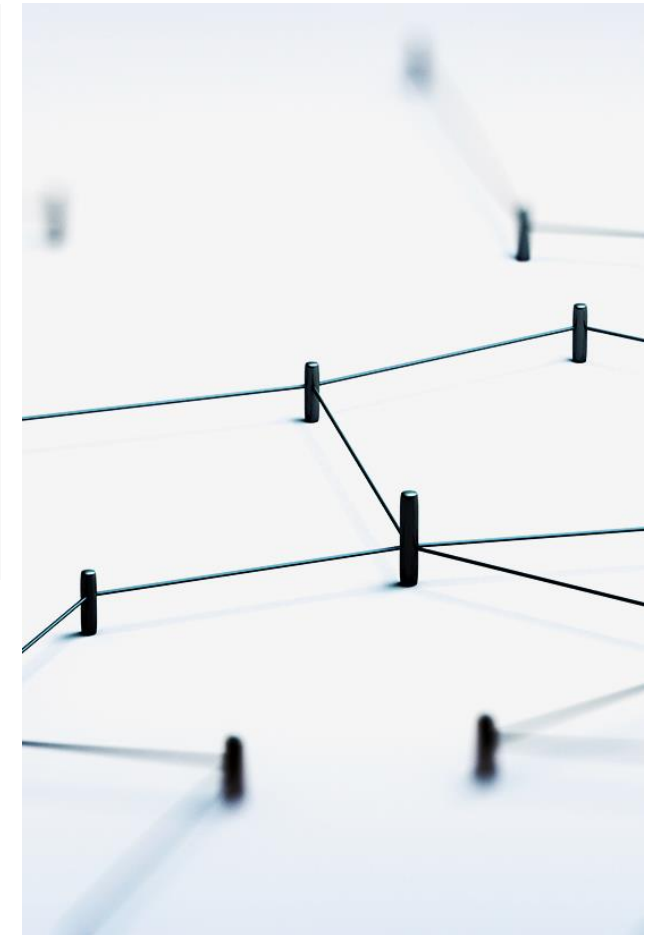
Highlighting plots using text analytics approaches (AI-based). Qualitative study of priority clusters.

Ipsos Syndicated Online Community

A quality syndicated online community. Online community consists of 500 people from different cities of Russia; discusses topics that consumers, researchers and marketers are concerned now.

Methodology

- Qualitative research;
- Online community consists of 500 people from different cities of Russia;
- Number of participants in each wave: 30-40 respondents.



IN THIS EDITION



Introduction

TREND VISION 2022. WHAT WAY TO GO?

1. Zoomers: Born for adaptation
SOCIAL PROFILE
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E-LEISURE & E-NTERTAINMENT

4Futures

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EDUCATION

4Futures

6. Earning with pleasure
FINANCES

4Futures

7. Contradictions on a plate
FOOD

4Futures

8. Technologies, emotions and awareness
RETAIL

4Futures

9. Crisis challenges algorithms
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Conclusion

HOLD THE LEVEL

SOCIAL PROFILE

Born for adaptation



Family does not mean children

Each tenth zoomer, aged 22-25, plans to become married in the coming year and the same amount plans to have a child. At the same time, the share of people aged 16-25 believing children to be mandatory in a family couple declined at 6 p.p. Over the last 3 years down to 49%. Though the Russian population reduced by 13k people over the last year.

Over the last year share of zoomers combining work & study declined by 9 p.p.

Overall share of working (46%) and non-working (54%) zoomers has not changed. They will constitute the backbone of new junior and middle level specialists in the coming 10 years. Meanwhile, due to lower share of this group, they will have to adopt to communicate with previous generations, each of which is in majority comparing to them.

Zoomers pass crises with a higher degree of comfort comparing to seniors

Contemporary crises, generally impacts financial aspect of life, i.e., price growth. There are less difficulties related to finding a job than due to COVID pandemic. Absence of own children, credits and co-living with supporting parents also help zoomers life during the crises.

POPULATION OF RUSSIA CONTINUES TO REDUCINE

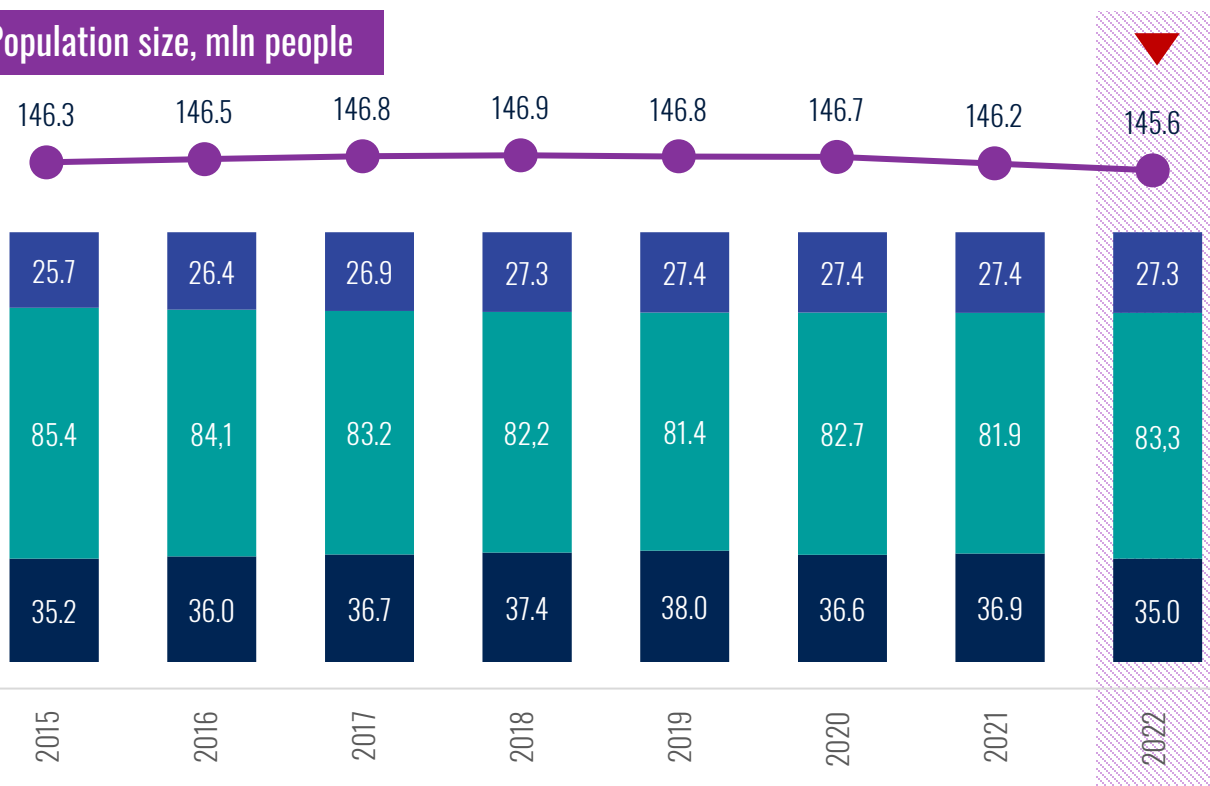
By the beginning of 2022, population of Russia continued reduction due to COVID: **- 613K. people**

- Number of births in Russia : 1 398K people. This is minimum since 2001 and by 38k less than in 2020
- Number of deaths in Russia: 2 441K people. This is absolute maximum over contemporary history of Russia, and by 303K more than in 2020

Number of zoomers aged 16-25 in 2022

14316_k +6k vs 2021

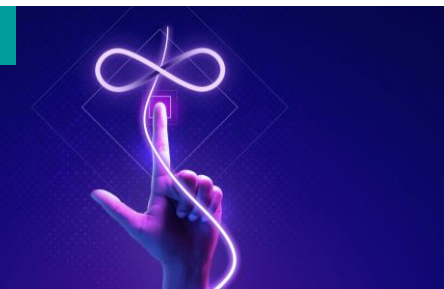
Population size, mln people



Distribution my age, mln people

- Below legal labor age (0-15 years)
- Labor age*
- Above labor age

SIGNALS



- Dog Aging Project, Loyal & Vaika – Biotech project on home dogs’ life prolongation, to gain knowledges and transfer them on people lives. >>
- By 2045 digital technologies bring us to life in VR. The project of Russian billionaire Dmitry Itskov. >>

CHILDREN STOP BEING A GOAL FOR MARRIAGE

Over the year the share of zoomers who are at “left a nest” stage (leaves without parents and without a partner) has increased.

In 2022/Q1 only a half of zoomers considers that a couple must have children, and it is far below total population of 16+ (73%). At the same time, decline of interest towards having children is observed among all groups.

Going to be married

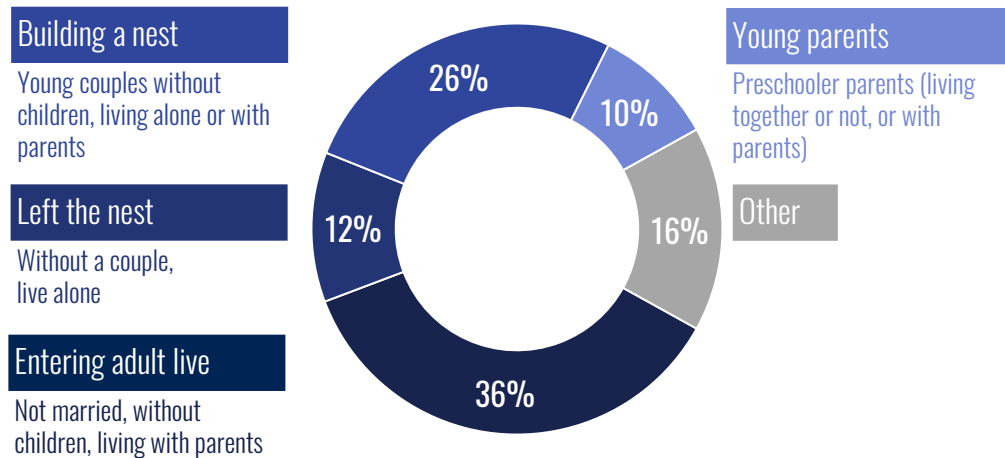
Age Group	Share (%)	vs 2020
16-17 years	3	+1 pp
18-21 years	7	-2 pp
22-25 years	11	-2 pp
All 16+	5	=

Planning a baby

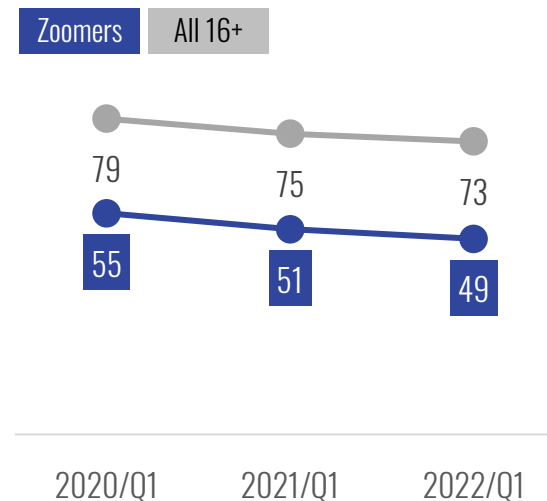
Age Group	Share (%)	vs 2020
16-17 years	1	=
18-21 years	4	-1 pp
22-25 years	8	-1 pp
All 16+	4	=

Source: Ipsos. RusIndex. 2021

16-25 y.o. zoomers distribution by Life Stages



Consider that spouses must have children (%)



SIGNALS



- Asian trend for marriage “beta-testing” coming to the Europe. >>
- The USA discuss equal rights for embryos. >>
- In 50 years, virtual Tamagotchi-kids will replace regular ones. >>



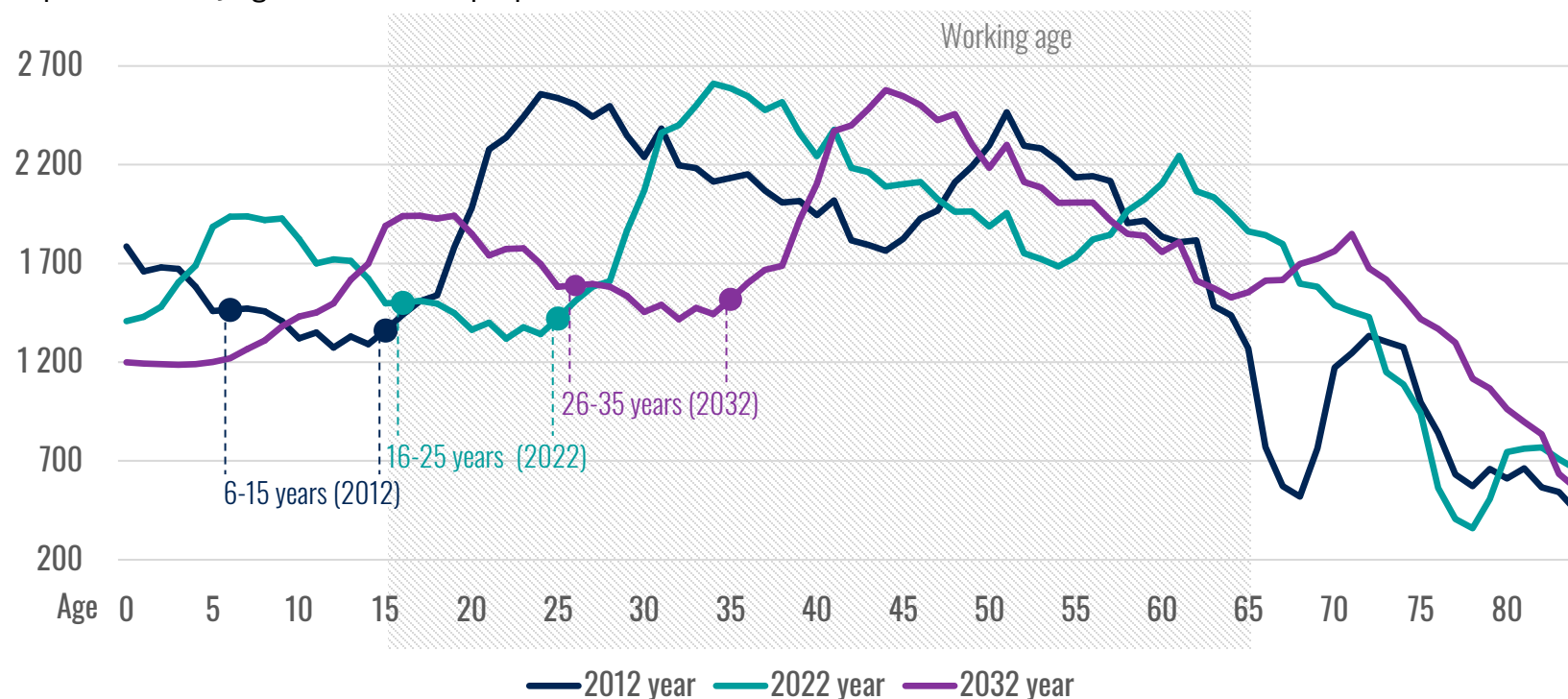
ZOOMERS AT WORK: USUALLY IN MINORITY

Young people aged 16-25 have entered working age and actively seeking ways for start working and earn money. Based on RusIndex data, 46% already working.

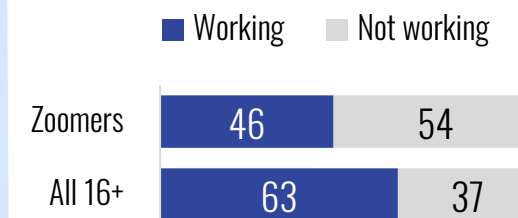
Zoomers are the backbone of new junior and middle level specialists in coming 10 years. However, this group is relatively small, due to demographic pit of 90s. Thus, zoomers are usually the smallest group in any a company and should adapt to conversation with other generations who are in majority.

Russian population forecast till 2032

Population size by ages, thousands of people



Occupation (%)



Source: Ipsos, [RusIndex](#), 2022/Q1
Russians 16+, cities with population of 100,000

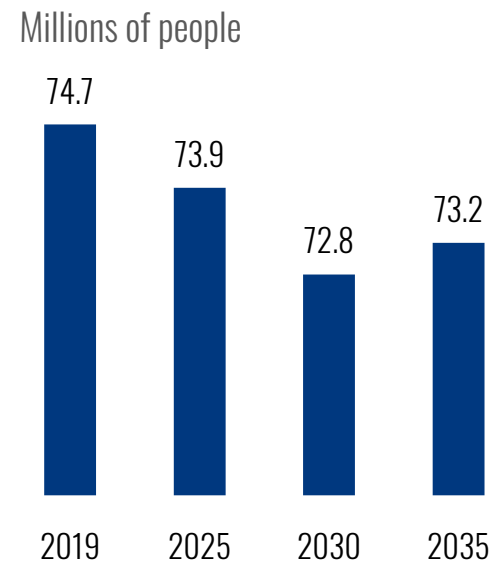


ZOOMERS COMPETING WITH OTHER GENERATIONS

By 2030, the number of workers will grow slightly, and competition among job seekers will increase. The reasons: raising the retirement age and entering the working age of the Alpha generation (born during the period of increased fertility 2007-2015).

Given the low proportion of zoomers, in order to succeed, they will have to develop social skills and emotional intelligence which help interact with other generations.

Labor force in Russia



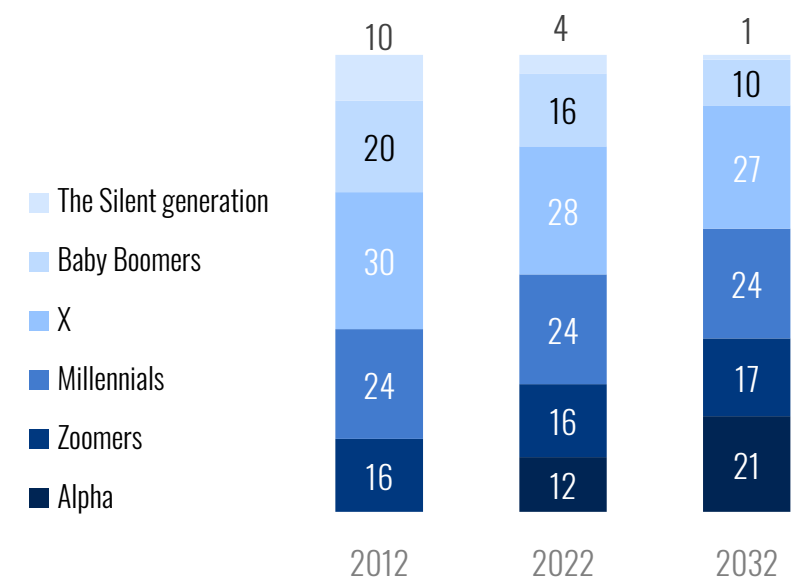
Source: [Demographic Changes and Labor Force, HSE, 2022 \(RU\)](#)

34% of working zoomers
 Combine work and study
 In 2022/Q1, the share decreased by 9 pp

27% zoomers
 See the search or change of workplace as a goal for the next 12 months.

Source: Ipsos. [RusIndex](#). 2022/Q1
 Russians 16+, cities with population of 100,000

Change in generation shares (%)



Source: [Federal Service for State Statistics](#)

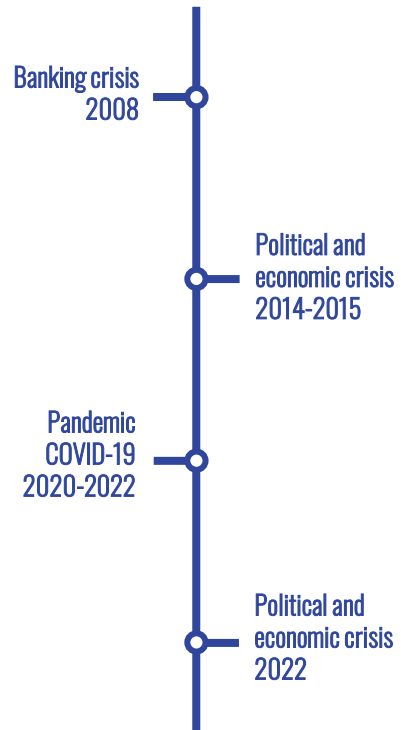




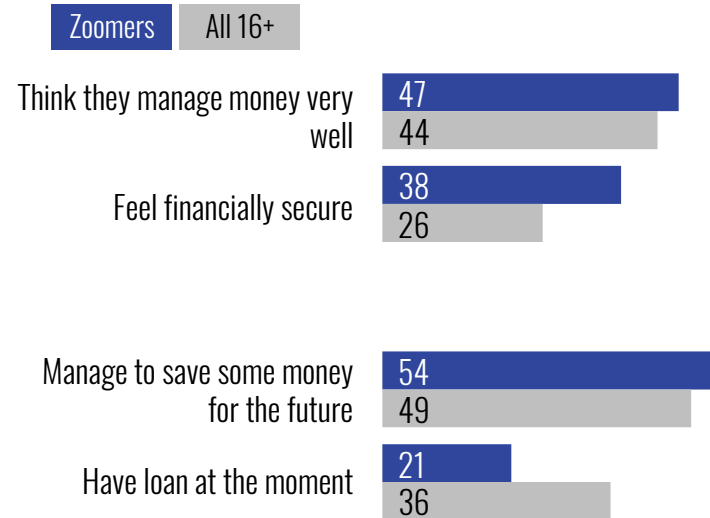
ZOOMERS GO THROUGH CRISIS MORE COMFORTABLY THAN WHO ARE OLDER

Zoomers are growing up during an era of frequent economic crises. However, unlike the general population, zoomers feel more comfortable, as many continue to live with parents who help them, do not have their own children, and are less burdened with loans.

A larger part of zoomers than among the general population have the opportunity to save money for the future, mainly leaving surpluses on bank cards, and not on savings accounts or deposits. However, a downward trend is visible – compared to 2020/Q1, the share of zoomers who can save money has decreased by 3pp. At the same time, the share of supporters of spontaneous spending is growing among zoomers, especially among girls.



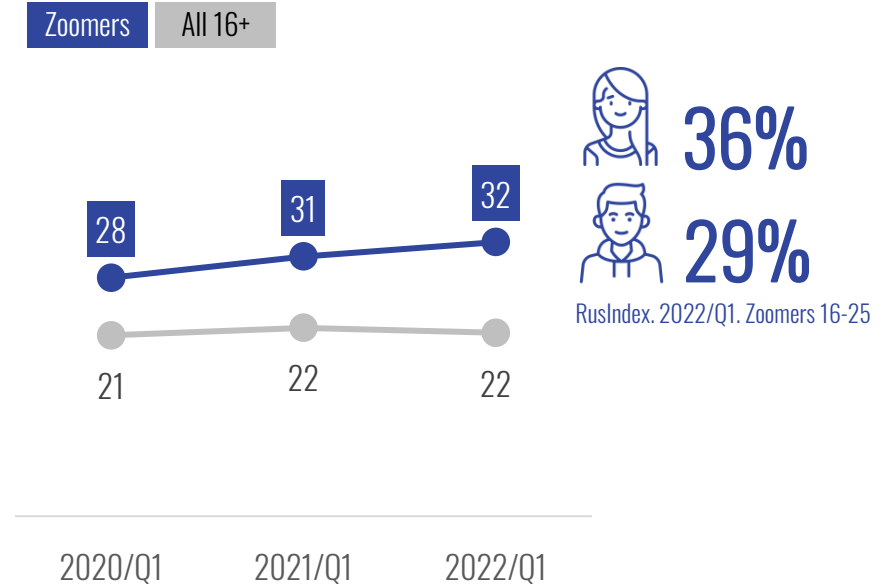
Financial questions (%)



Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

“I tend to spend money without thinking”

The proportion of those who agree with the statement (%)





ZOOMERS FEEL PRICE INCREASE, BUT THEY PAID MORE ATTENTION TO SHORTAGE OF PRODUCTS IN 2022/Q1 THAN OTHERS

Current crisis has manifested itself, first of all, by an increase in prices – both for zoomers and for the population as a whole. At the same time, young people are less sensitive to price increases in stores for the reasons already mentioned (help from parents, fewer loans, no children).

The temporary shortage of products in 2022/Q1 impressed zoomers harder than others: almost every fifth zoomer noticed it and only every tenth among 16+.

There are much less difficulties with employment and wages for all groups than last year.

What changes affected (%)

	Zoomers	vs 2021/Q1	All 16+	vs 2021/Q1
Rising prices in stores	76	+4 pp	89	+2 pp
Shortage of products in stores	18	+4 pp	11	+4 pp
Difficulties with employment	16	-6 pp	13	-3 pp
Salary reduction	15	-5 pp	13	-8 pp
Leaving the old place of work	11	-3 pp	8	-3 pp
Salary payment delay	10	-5 pp	7	-3 pp
Reduction or cancellation of bonuses	9	-7 pp	13	-4 pp
Difficulties with obtaining a loan	6	+3 pp	5	=

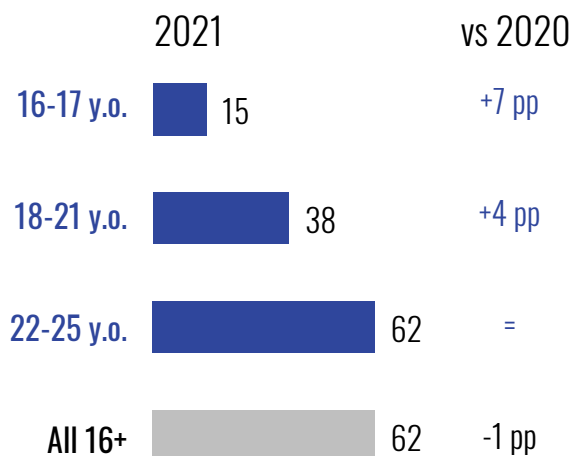
Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

ZOOMERS ARE HETEROGENEOUS

When analyzing zoomers, it is necessary to remember about the age specifics within the generation: schoolchildren aged 16-17 mostly live with their parents and do not work yet, and young people aged 22-25 are already quite adult and independent.

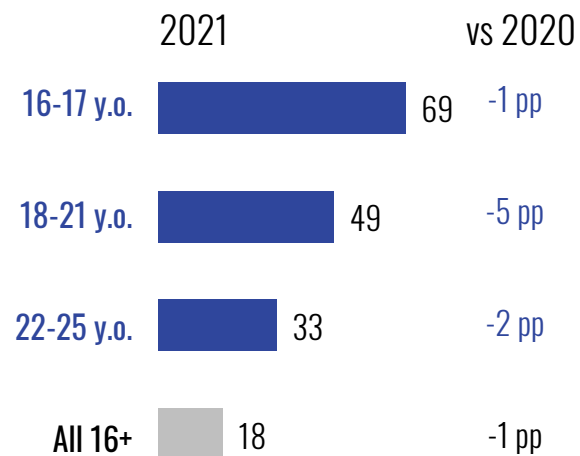
In the time span from 2020 to 2021, the share of employees in the age groups of 16-17 years (+7 pp) and 18-21 years (+4 pp) has increased significantly. At the same time, the average age group of 18-21 years for the year became 5 pp less likely to live with their parents.

Work (%)

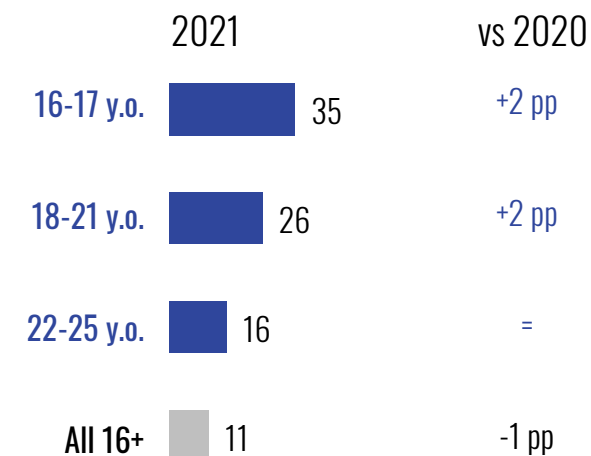


Live with parents (%)

Their own or their spouse's parents



Receive financial support from relatives (%)



VALUES

Be yourself and enjoy life



The value of the family is falling, and the value of relationships and enjoyment of life is growing

Family for zoomers is still the main value, but it is twice as weak as that of other generations. Love, joy of life and self-expression are a priority. It is also important to express yourself in social networks through an attractive page.

Appearance as a social position

Appearance loses importance as a tool for attracting the opposite sex, especially in girls - the negative dynamics was -12pp in three years, in boys only -7pp. Appearance for the zoomer is a means of expressing the inner self.

Mental health is important for zoomers, especially for girls

Zoomers are more satisfied with life in general, as they are protected by their parents, they have fewer adult worries, and they avoid news, paying for peace of mind with a sense of isolation from what is happening. At the same time, zoomers have a lot of personal experiences, especially girls. They are more susceptible to stress, can worry about trifles and feel that life is unfair to them. But zoomers are advanced in mental health issues, ready to work out personal problems with a psychologist - that's what TV series teach them.

THE VALUE OF THE FAMILY IS FALLING, AND THE VALUE OF RELATIONSHIPS AND ENJOYMENT OF LIFE IS GROWING

Earlier we mentioned that a family for zoomers does not necessarily mean having children. However, in the list of values, family and children are combined into one point, and it tops the rating, although he lost 3pp in a year, and scores much less in 2022/Q1 than among the entire audience of 16+ (26% among zoomers, compared to 51% among 16+).

For zoomers, enjoying life is especially important: among them it is in second place in the rating, with a very slight lag behind the leader, while in group 16+ the family/children look like the only value next to which everything else seems not to be taken into account.

It is quite expected that zoomers are not so concerned about health, but among them the values of love, friendship, freedom, independence and everything related to development (creative self-realization, career, education) are more pronounced.

The most important value (%)

Less important for zoomers than for all 16+

	Zoomers	vs 2020	All 16+	vs 2020
Family, children	26	-3 p.p.	51	=
Material security equipment	7	=	9	=
Health, beauty, good physical shape	3	=	7	=

More important for zoomers than for all 16+

Enjoying life	23	+2 p.p.	10	+1 p.p.
Love, relationships	12	+2 p.p.	7	=
Freedom, independence	8	-2 p.p.	6	=
Creative self-realization	6	-1 p.p.	2	=
Self-Realization in work, business	3	=	2	=
Friends	4	+1 p.p.	1.1	=
Career, power, status	4	+1 p.p.	0.9	=
Education, advanced training	2	=	0.8	=

Equally important for zoomers and for 16+ (not in the top)

Spiritual development	4	=	4	=
Social work, assistance to those in need	1	=	0.4	=

APPEARANCE AS A SOCIAL POSITION

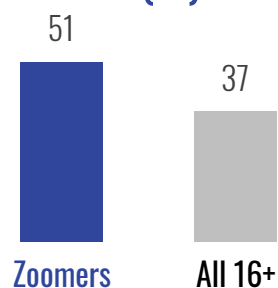
Zoomers are in search of meaning, awareness of their individual purpose, their development trajectory. Expected for the younger generation, just entering the path of life, they strive to be different from others without worrying about someone else's opinion.

54% consider themselves creative people. In the hobby profile - along with modern eSports - classical creative ones also stand out: drawing, playing musical instruments, vocals and dancing. Contrary to numerous talk about zoomers' fascination with astrology and esotericism, these types of activities are singled out by only 4% of zoomers as a hobby and this is the same percentage as among 16+ in general, the data also do not show gender characteristics.

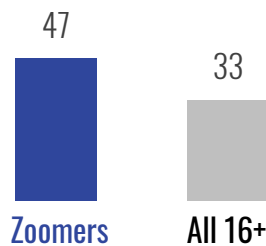
Hobbies have a pronounced gender specificity in zoomers. Thus, 22% of young people are fond of eSports; 11% play musical instruments. Drawing is the hobby of 29% girls; 12% - dancing, 8% - playing musical instruments.

54% Consider themselves creative people
zoomers 47% for all 16+

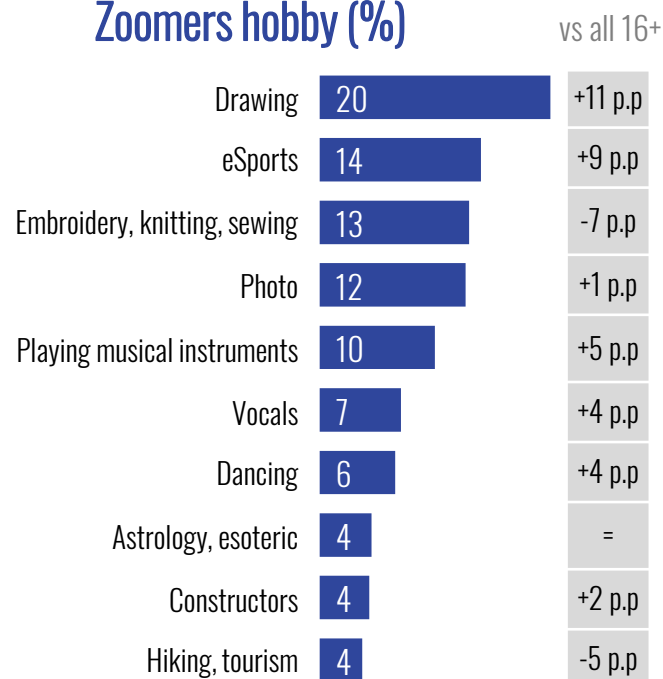
Strive to be different from other (%)



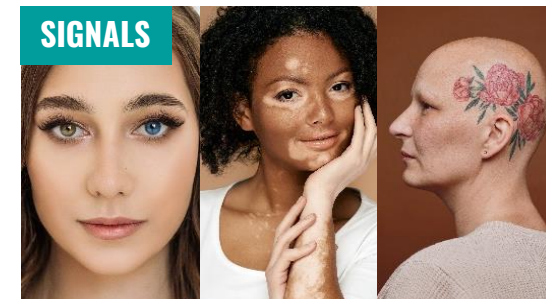
Behave as the like without worrying about the opinion of others (%)



Zoomers hobby (%)



SIGNALS



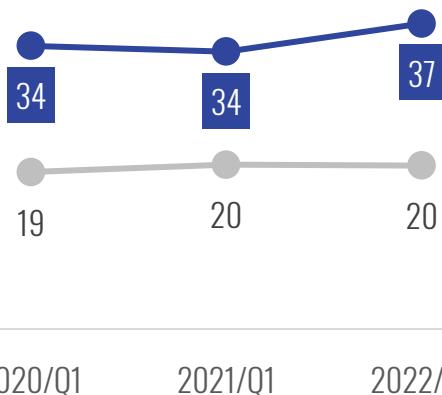
Vitiligo, lack of hair or different eye colors are no longer hidden as flaws. These are features that attract subscribers to the pages in social networks of models with non-standard beauty. [Top 10 pages in social networks >>](#)

IT'S IMPORTANT TO EXPRESS YOURSELF ON SOCIAL NETWORKS

Zoomers differ from previous generations in their passion for social networks, active online communication. Having a bright personal page in social networks is important for 37% of zoomers, while among the population as a whole - only for 20% of respondents. In the same ratio, the importance of sharing online what is really happening in life is distributed.

Consider it important to have a bright personal page in social networks (%)

Zoomers All 16+



Source: Ipsos, [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

34%

zoomers

Consider it important to share online what is happening in their lives

19% – throughout the sample 16+

Source: Ipsos, [OnLife](#). 2022/H1
Russians 16-25 y.o., cities with a population of 100,000+, active internet users



- The beauty industry looks at the younger generation looking for a balance between the desire for natural self-expression and the desire to stand out in social networks. >>
- BeReal. There is a growing demand for social networks without likes and staged shots. Startups in the "anti-instagram" genre appear.>>

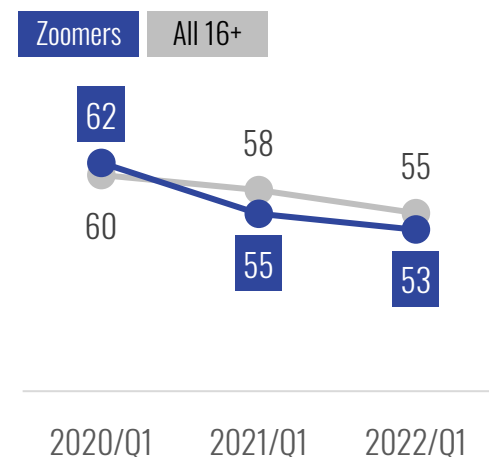
APPEARANCE OF ZOOMER – ITS SOCIAL POSITION

Appearance loses its value as a tool to attract the opposite gender, but becomes a means of expression «inner self». Interestingly, in this position, the zoomers do not differ from the general population. However, zoomers have a large gap in the importance of attractiveness for the opposite gender - for boys (56%) and girls (49%). The gap between zoomers and young women increased from 1 p.p. to 7 p.p. in 3 years, while in the general population 16+ as a whole the gap according to the data 2022/Q1 is only 1 p.p. The indicator of the girls 16-25 have fallen on 12 p.p. for three years, the young people of the same age - 7 p.p.

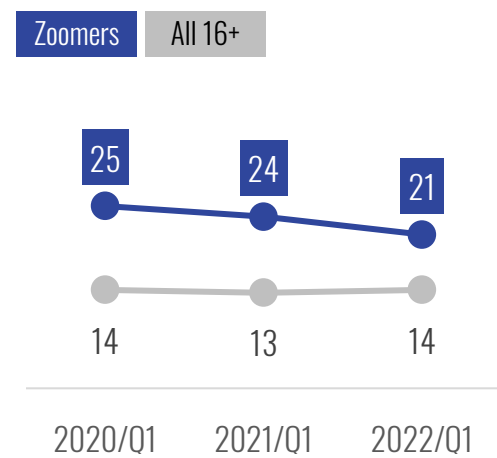
Beauty for zoomers is identical to the expression of their natural unique essence, the desire to be themselves. Zoomers significantly more than others spend time to the daily care routine, which can be quite multistage and saturated.

The dynamics show a drop in spending on cosmetics, reflecting the demand for savings in the crisis, and the trend towards naturalness. Visiting beauty salons by zoomers is also reduced along with the general trend. At the same time, the zoomer request is a quick non-invasive beauty procedure with instant effect - to immediately go to the party!

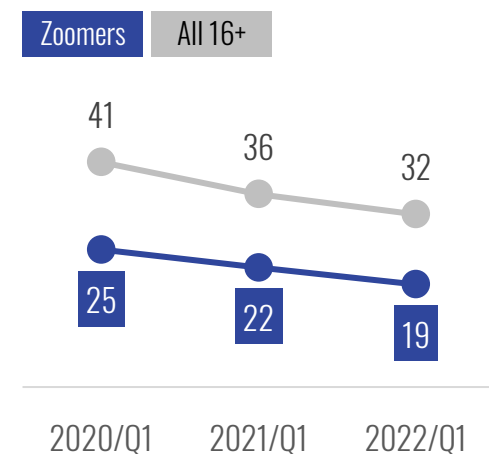
It is important to be attractive to the opposite gender (%)



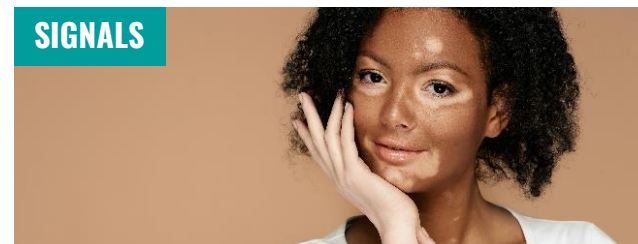
Spend a lot of money on cosmetics and care products (%)



Visited beauty salons in the last three months (%)



SIGNALS



- 24-year-old Olamide Olov raised \$2.6 million for a new brand of Topicals cosmetics for people with chronic skin diseases. The brand became popular for zoomers. >>
- In the top among the young people - quick non-invasive beauty procedures with instant effect. After the cosmetologist - directly to the party. >>



MENTAL HEALTH IS IMPORTANT FOR ZOOMERS, ESPECIALLY FOR GIRLS

As already mentioned, parents and fewer adult worries help the zoomers survive economic crises more easily. Zoomers are generally a little more satisfied with their lives than older people, though this is often achieved by avoiding the news and resulting in a feeling that they are away from everything.

But zoomers have their own personal concerns, especially girls. Girls-zoomers are more likely to experience stress (both in comparison with boys and total sample 16+). They may worry about things and feel that life is unfair to them.

The zoomers emphasize the importance of maintaining their mental well-being and building personal boundaries. Working with a psychologist becomes the norm, and these norms, together with an internal request for the state of personal comfort, zoomers can draw from social networks and serials.

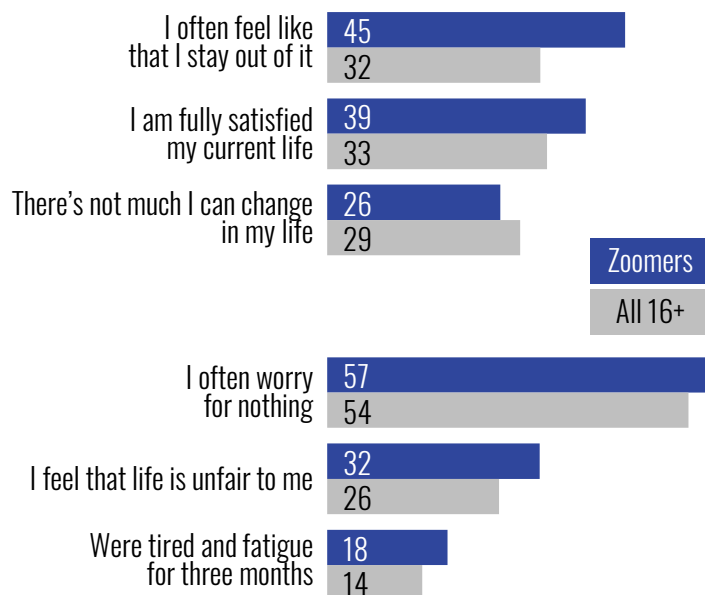
Endured stress
in the last three months



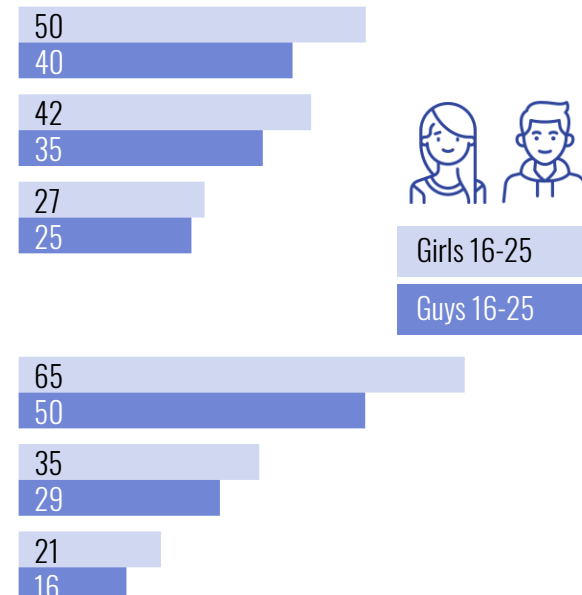
8% among 16+ in general

Source: Ipsos. HealthIndex. 2022/Q1

Attitude to life (%)



Split by gender among zoomers (%)



SIGNALS

- Turning to a psychologist is no longer shameful and even encouraged. >>
- Online meditation apps are considered more attractive than audiobooks and podcasts by investors. >>
- Nothing App: the app that does nothing has already been downloaded more than 1 million times. >>



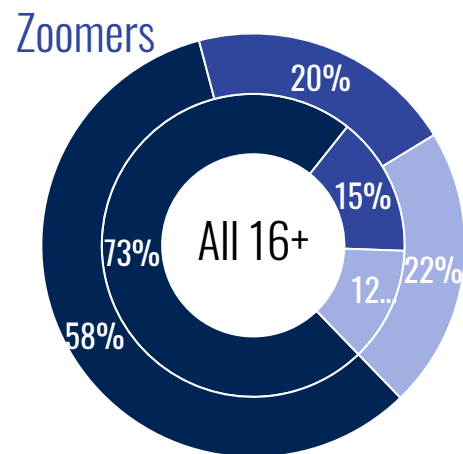
ACCEPTED PRACTICES OF MAINTAINING MENTAL HEALTH GO INTO THE UNIMPORTANT CATEGORY

Comparing 2022/Q1 vs. 2021/Q1, there have been noticeable changes - the share of zoomers who have practiced methods of mental health, such as positive thinking, sleep and rest, regular physical activity has decreased. At the same time, the percentage of those who consider it unimportant has increased.

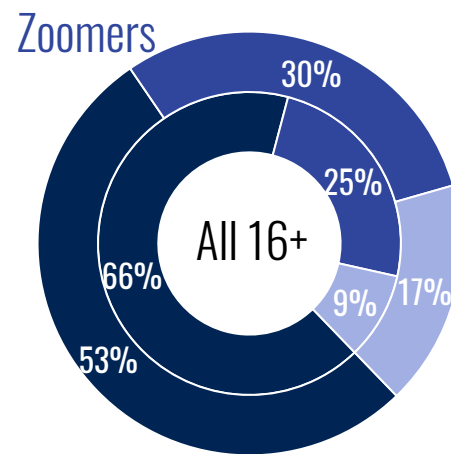
At the same time, and the gap with the total sample of 16+ not in favor of the young - zoomers are significantly less likely to practice positive thinking or monitor their sleep and rest regime. For regular physical activity, the gap with the overall sample is much smaller. However, this may be affected by the fact that most zoomers are still studying and getting regular physical activity, including through compulsory physical education in educational institutions.

The only factor on which there is no gap in adherence to the practices - meditation and yoga (30% - for zoomers and 28% - for all 16+).

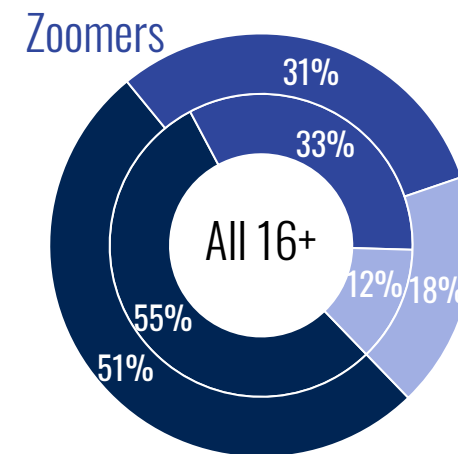
Positive thinking



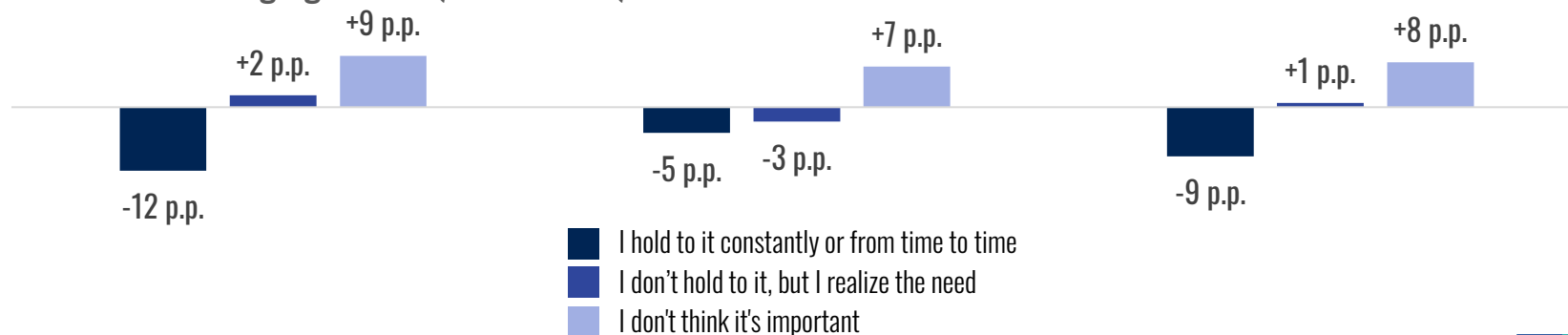
Sleep and rest



Regular physical activity



Zoomers. Changing 2022/Q1 vs 2021/Q1



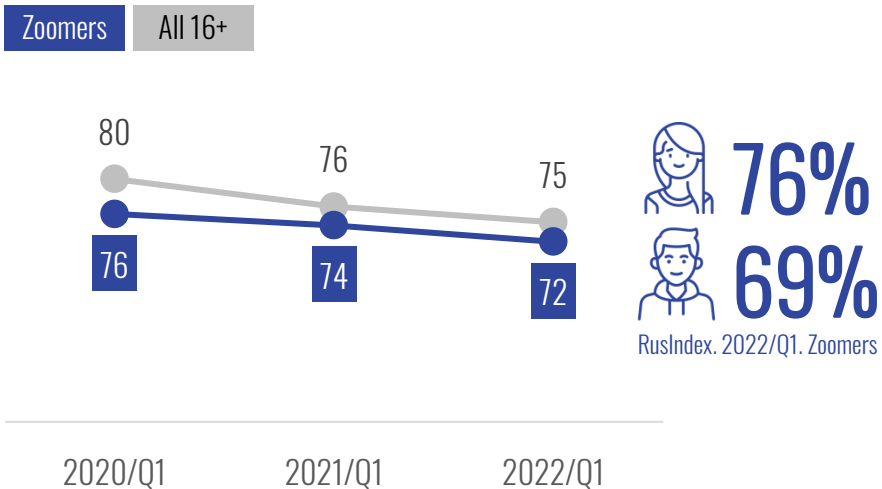
DECLINING THE NEED TO BE ONLINE CONSTANTLY

The desire to be online all the time is reduced both among zoomers and the general population. Although the share of those who like to be in touch all the time is high, zoomers, who have been having mobile phones since childhood, significantly less tend to total connectivity. Thus, they have a higher request for digital detox than the general population.

Women are more interested to keep in touch consistently. As a result, they are also most often speaking for the benefit of digital detox.

“I like being in touch via the Internet or a mobile phone all the time”

The proportion of those who agree with the statement (%)



Source: Ipsos. [RusIndex](#). Russians 16+, cities with population of 100,000

Occasionally, they feel the need in digital detox in order to give the brain a rest



60% – by sample 16+

Source: Ipsos. [OnLife](#). 2022/H1
 Russians 16+, cities with a population of 100,000+, active internet users

SIGNALS

- 2022 Digital Detox Challenge. In the United States, people turn off for 24 hours from all screens and any smart devices, such challenge has holden the second consecutive year. Participants are given a 250\$ Amazon gift card to build a “tech-less survival kit”. The contestant will receive \$2,400 for completing the Digital Detox Challenge. [>>](#)
- As one of the new options of tourist positioning for the republic of Bashkortostan is proposed to choose the concept “The best digital detox in Russia”. [>>](#)

ENVIRONMENT

Eco-friendly, but comfortable

Digital transformation moving zoomers away from nature

The desire to observe and understand nature in the digital generation of zoomers is expectedly lower than in the general population. With an equal number of environmentalists and those indifferent to the environment, it makes sense for brands to segment consumers in relation to caring for nature in order to look for a specific approach to each segment.

Zoomers are worried they would have to sacrifice their comfort for protecting the environment

Zoomers are more willing to change habits for protecting the environment, but they are afraid of losing comfort. Sustainability comes into conflict with an important value for zoomers – enjoyment of life. Corporate giants, responding to this need, are creating projects of comfortable eco-cities of the future, where, among other things, they want to minimize the number of cars and roads.

Zoomers are more willing to pay for eco-friendliness

Zoomers are ready to buy products in recyclable packaging, stop wearing real fur/leather and switch to electric cars. They use reusable bags and containers to collect batteries and are more active than the general population in bringing unnecessary clothes and putting them in special boxes in shopping malls.



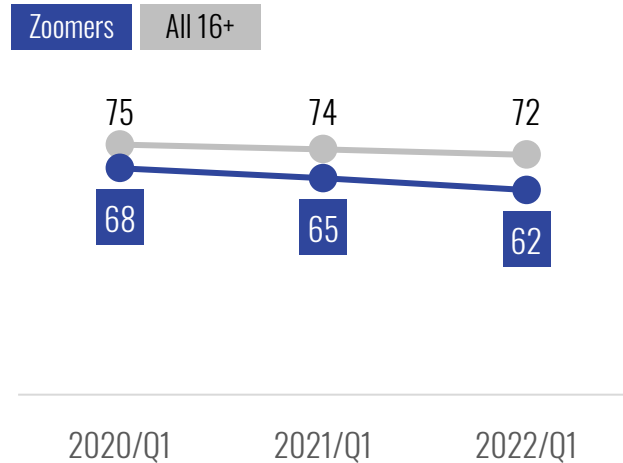
ARE ZOOMERS READY TO CHANGE BEHAVIOR?

Interest in nature is declining – among zoomers (for whom it is lower than for the general population), it is declining even more intensely. The desire to observe and understand nature has lost 3pp in two years among the general population, for zoomers it is declining by 3pp each year. The ongoing digitalization is moving people away from nature.

Despite the relentless talk about the importance of being environmentally friendly, the data does not show an increase in the propensity of both the general population and the zoomer generation to further change their behavior in order to save the planet. Enjoying life is an important value for zoomers, and they are not ready to give it up for the sake of nature. Of course, the willingness of every second young person to change their behavior for the environment is still a lot. However, if among young people we see an approximately equal number of environmentalists and indifferent to the environment, it makes sense for brands to segment consumers not only by types of purchasing, but also by types of environmentally friendly behavior in order to find their own approach to each segment.

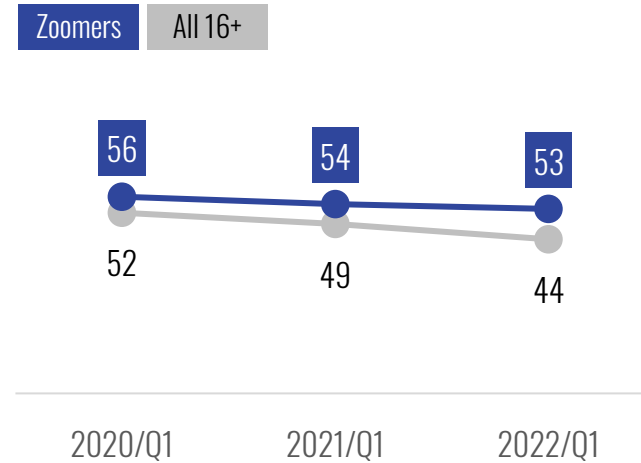
“I like to observe and understand the nature”

Share of those who agree (%)



“I'm ready to change my habits in order to improve the environment”

Share of those who agree (%)



- Environmentalism in living spaces: Parks on sky bridges and roofs, more green spaces. >>
- Goblincore? No, Kikimora core! Movement among zoomers who want to be closer to nature and protest against overproduction. >>



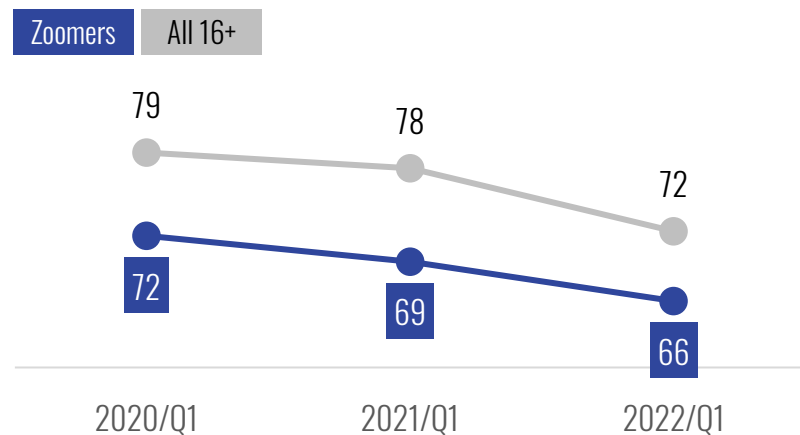
COMFORT CHALLENGES SUSTAINABILITY

Year by year, consumers are increasingly noticing positive changes in environmental culture in Russia. This is also because convenient eco-friendly practices are spreading throughout the country thanks to the efforts of [responsible brands](#) and the actions of [public organizations](#). While zoomers are more willing to change their behavior for the environment, they are also more worried that doing so might limit their comfort. Therefore, it is important for brands to create conditions so that pro-environmental behavior is not perceived by young people as sacrificing personal convenience.

Some corporations, such as, for example, the [Chinese Tencent](#), go even further in their environmental responsibility and develop projects for the construction of entire eco-cities, designed to combine technology, eco-friendliness and comfortable life. Over the past 10-20 years, there have been many projects of such cities, and although there are still no really successful ones, every year there is news about new projects of eco-cities of the future. Enthusiasts of resettling in new completely ecological cities are not leaving attempts to succeed. The latest trend is the rejection of cars and roads in the projects of such cities.

“Our country has low ecologic culture”

Share of those who agree (%)



“I worry that the need to limit consumption for the sake of the environment will make my life less comfortable”

35%
zoomers

27% of all 16+

SIGNALS



- Infinite metropolis – it is proposed to build a new sustainable architectural miracle in Dubai – a ring around the Burj Khalifa tower. [»](#)
- Chinese internet giant Tencent plans to build a car-free eco-city of the future in Shenzhen. [»](#)
- Saudi Arabia starts construction of LINE – a linear city of the future without cars and roads. [»](#)
- What an underwater city of the future might look like – Hydropolis – a project of Gazprom Neft and LIFE. [»](#)



ZOOMERS ARE MORE WILLING TO PAY FOR ECO-FRIENDLINESS

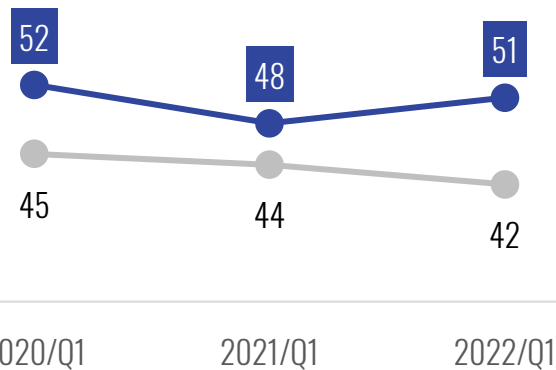
The economic crises that are taking place in Russia do not allow the social responsibility of business to become an actively growing driver of consumer behavior. Consumers are still focused on the basic characteristics of the product and the price. They consider environmental aspects as an important factor only when all other things are equal. In addition, sustainability has ceased to be the lot of a narrow circle of leading brands, business statements about the commitment to the “green agenda” can now be heard almost everywhere, and sustainability is turning from a differentiation factor into a hygiene factor.

Against this background, zoomers stand out with their higher propensity to buy from socially responsible companies. They are ready to vote with their money for environmental friendliness when the brand's position coincides with their vision and, on the contrary, refuse to buy what they consider unacceptable for the planet.

“I like to buy goods from socially responsible company”

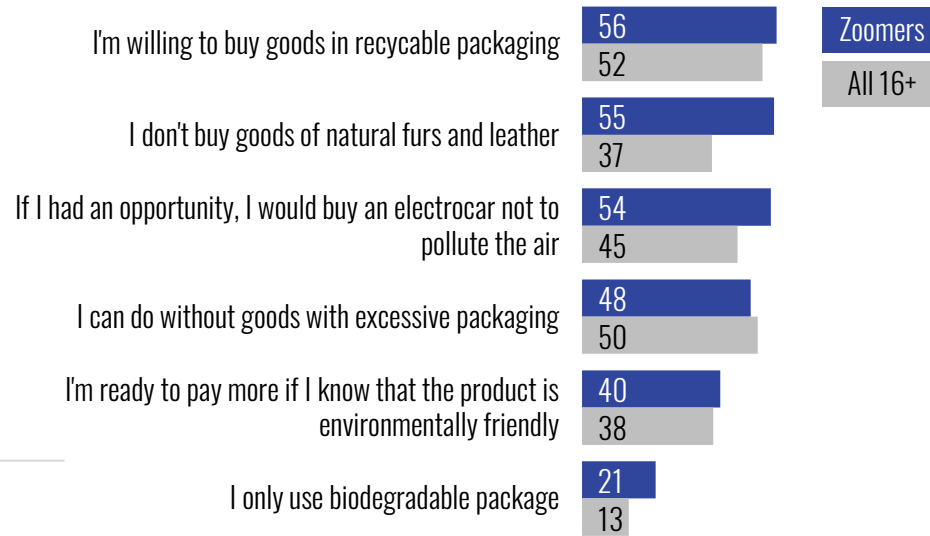
Share of those who agree (%)

Zoomers All 16+



Pro-environmental consumption

Share of those who agree (%)



SIGNALS

- Coca-Cola is phasing out green Sprite bottles because they cannot be recycled. The new Sprite bottles will be transparent. >>
- Companies are reducing the carbon footprint of their websites. >>
- Air Company, a startup, uses CO2 emissions to create Air Eau de Parfum. >>

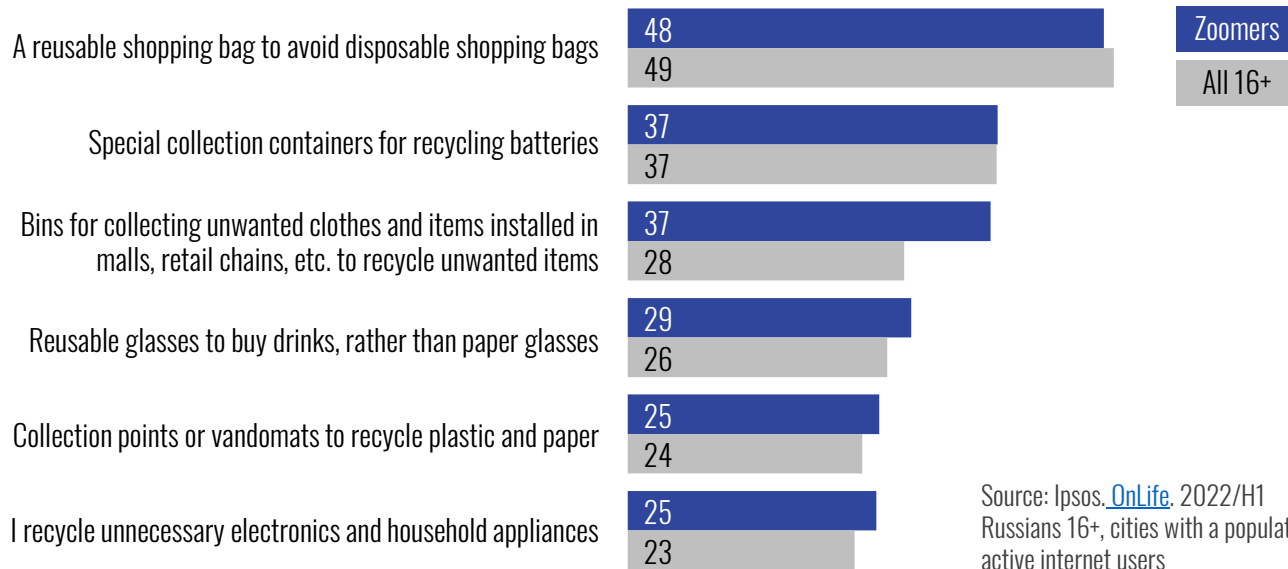


JUNK AS ALTERNATIVE CURRENCY

Almost every second respondent (including zoomers) already uses reusable bags instead of plastic bags. The second place in terms of popularity pro-environmental behavior types is the collection of used batteries in special containers. Using boxes to collect unnecessary things in shopping centers is more typical for zoomers than for the general population – 37% of zoomers do this against 28% among all 16+.

Every fourth person already uses vending machines for collecting plastic and paper, but with the addition of bonus rewards for using vending machines and the option to pay for certain products or services, for example, [utility services](#) or [carsharing](#), the popularity of such recycling will only grow. The emergence of bonus rewards for other types of environmentally friendly behavior can be expected in the future.

Pro-environmental behavior. What people do already (%)



Source: Ipsos. [OnLife](#). 2022/H1
 Russians 16+, cities with a population of 100,000+, active internet users

SIGNAL



Drugoe Delo, a project to encourage young people to recycle aluminum and plastic.

Points earned for recycling in the mini-application of the Drugoe Delo on VKontakte can be exchanged for bonuses, including professional internships in leading companies, trips around Russia, training courses, souvenirs from partners and much more. [>>](#)

E-LEISURE & E-NTERTAINMENT

Forced readjustment



Movies and videos online. Betting on short formats

Series and shorts overtake fiction movies among the types of videos that zoomers downloaded or watched online. With the introduction of sanctions in 2022, online movie theaters also see a solution in the development of short formats.

Music is the main driver of page visits and purchases for online zoomers

Humor is the second most visited social media page, but prank authors need to keep in mind that the trend toward mental wellbeing is reducing the desire of zoomers to make jokes about people.

Entertainment opportunities have decreased

The audience of games was less affected by the blocking of foreign social networks. But the share of fans of pranks and contests decreased noticeably, especially among zoomers. Zoomers are also more likely to be members of communities about sports.

Korea in the Runet mirror

Six major K-themes in social media in Russia

CINEMA AND VIDEO ONLINE: BETTING ON SHORT FORMATS

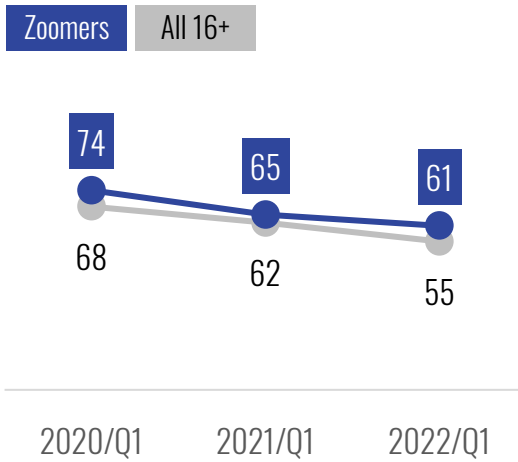
Online content, which has been actively growing in popularity in recent years, is showing a negative trend starting in 2020. This applies not only to the video format as a whole, but also to online movie theaters, whose share of users dropped by 5pp in the last year alone. At this point, video portals and online movie theaters are used by 42% of zoomers (RusIndex, 2022/Q1).

Of the video content formats in demand, short clips came in second place - every second zoomer watched a video of this type (OnLife 2022/Q1). Expecting a "content famine" due to another wave of sanctions, causing the outflow of Western content, the departure of major foreign video services, online movie theaters are also betting on short video content to retain users ([source – Inc.ru](#)).

Off-line cinemas also continue to lose their remaining audiences. However, it is still a popular recreational format for one in four zoomers. It is noteworthy that slightly more than the third zoomer combines the use of online movie theaters and going to cinemas offline.

Watching movies and videos online

Watched movies and videos online in 3 months (%)



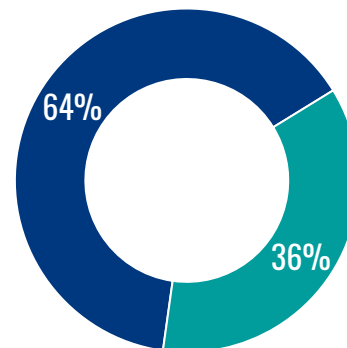
What videos have the zoomers watched or downloaded

In decreasing popularity. OnLife 2022/H1

	vs all 16+
1 Series	+6 pp
2 Short videos	+2 pp
3 Feature films	-12 pp
4 Video blogs	+7 pp
5 Music videos, concerts	-1 pp
6 Cartoons, anime	+6 pp
7 TV shows, news	+1 pp
8 Video courses, training videos	+1 pp
9 Letsplays	+11 pp
10 Product video reviews	+3 pp

Combination of offline and online cinemas

- Watched only online
- Combined online and offline



SIGNAL



- To attract new users in the context of the expected "content hunger," online movie theaters are betting on short content - web series and short films. [>>](#)
- «Gazprom-Media» launched the «analog of TikTok» - social network Yappy with short vertical videos and a focus on collabs. [>>](#)



MUSIC IS THE MAIN DRIVER OF VISITS TO SOCIAL NETWORKING PAGES

Music is the most popular topic of pages visited by zoomers on social networks. This topic attracts one in three zoomers. The difference with the overall sample of 16+ is a significant 10 pp. Eighty-six percent of zoomers reported using a music streaming service, 7 pp higher than the overall sample.

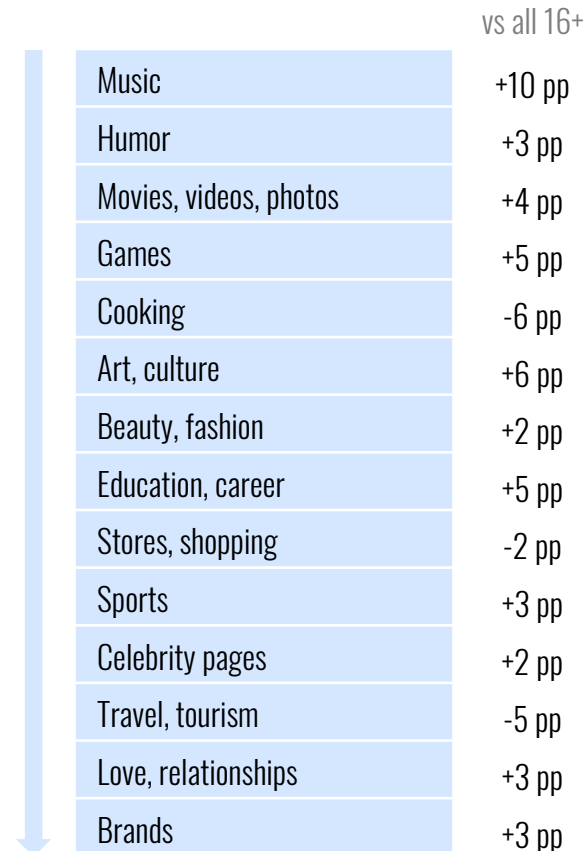
In second place by a small margin is humor. In general, the level of interest in humor is not too different from that of the general 16+ audience. Jokes, memes and pranks are an integral part of social media content. But in this regard, it is interesting to note the negative dynamics of the desire to make fun of people that are noted among the zoomers - although zoomers are more likely to make fun of others, the proportion who agree with such a statement has decreased by 6pp over two years. This may be one manifestation of a more active development of soft skills in the younger generation.

Level of interest by zoomers in social media is significantly higher in games and entertainment, art, education, sports, relationships, and brand pages.

But the zoomers expressed less interest in travel and cooking than in the 16+ sample as a whole.

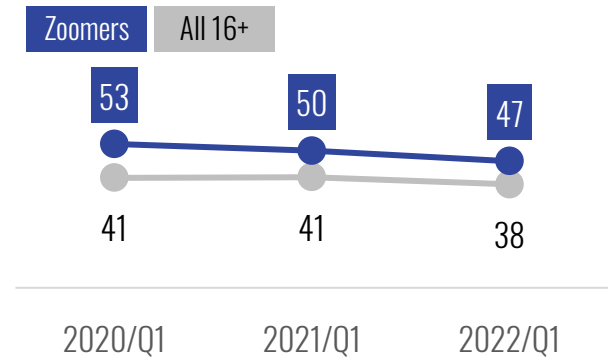
What pages zoomers visited in social networks

In descending order of popularity. OnLife 2022/H1



“I like to make fun of people”

Percentage agreeing with the statement (%)



Source: Ipsos. Research РосИндекс. 2022/Q1
Russians 16+, cities with a population of 100,000+.



- What the Future. How technology will affect the music of the future. >>
- The most popular TikTok challenges inspired by K-pop artists. >>



EVERY 2ND ZOMER PAYS FOR ONLINE CONTENT

Slightly more than every second zoomer has a habit of paying for content. Interestingly, while among all Internet users 16+ compared with the second half of 2021, the share of those who pay for online content fell by 3 pp, it lost less among zoomers - only 1 pp (OnLife data). Music expectedly comes out on top in terms of the type of content that zoomers are willing to spend money on online.

The percentage paying for videos or movies is also high, but unlike music, zoomers are less willing to pay for videos than the 16+ audience as a whole. Podcasts are another category where zoomers are more likely to spend money compared to the general population.

Approximately every fourth zoomer uses torrent trackers. Here the share of users is not significantly different from the overall sample of 16+, where 21% of respondents use torrents.

Paid for content

for the last 3 months (%)

54%
zoomers

41% of all 16+

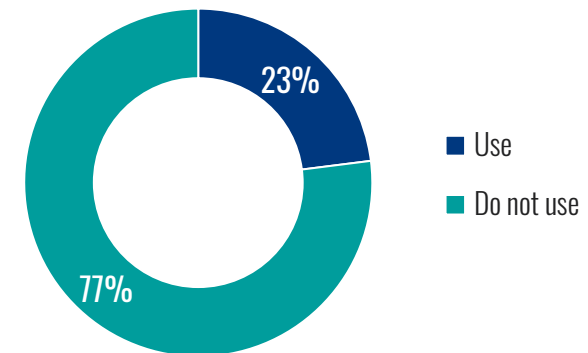
Source: Ipsos, [OnLife](#), 2022/H1
Russians 16+, cities with a population of 100,000+,
active internet users

What type of digital content did the zoomers pay for

In the last three months, in descending order of popularity. OnLife 2022/H1

Music	+15 pp	vs all 16+
Videos, movies	-6 pp	
Games	-2 pp	
Apps	+1 pp	
E-books	-4 pp	
Podcasts	+6 pp	
Software	-1 pp	

Use of of torrent trackers by zoomers



Source: Ipsos, [OnLife](#), 2022/H1
Russians 16-25 y.o., cities with a population of 100,000+,
active internet users



RUNNING FROM FITNESS CLUBS

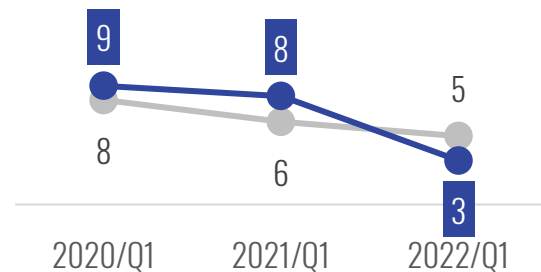
The 2020-2021 coronavirus pandemic has noticeably expanded sports content on social media. One in five zoomers is in a Sports-themed group. That's 5pp more than among the 16+ population. Postpandemic recordings and live broadcasts of a variety of workouts and exercises have been enriched by entertaining sports challenges. Such challenges are most often filmed by users in their homes or at outdoor athletic venues.

Fitness clubs as a place to visit have become of little interest to zoomers. They concentrate on specialized sports and dance studios and are also fans of running. Even though the pandemic is behind us, [experts still expect online fitness to grow in 2022](#), though they see the segment as close to saturation.

Visiting fitness clubs

in 3 months.(%)

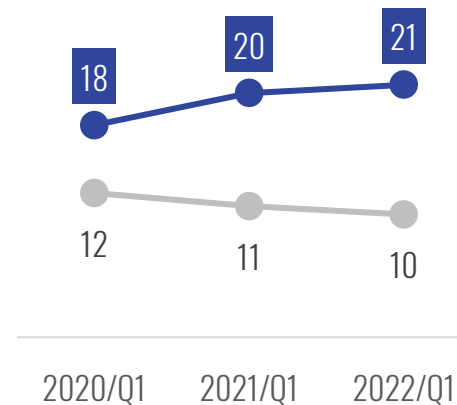
Zoomers All 16+



Source: Ipsos. [RusIndex](#).
Russians 16+, cities with population of 100,000

Running (%)

Zoomers All 16+



Source: Ipsos. [RusIndex](#).
Russians 16+, cities with population of 100,000

26% zoomers

Think of sports
as a hobby

18% among all 16+
RusIndex 2022/Q1

20% zoomers

They are members
of communities on
social networks on
the topic of "Sports",

15% among all 16+
OnLife 2022/H1

Top TikTok Sports Trends in 2022

- Body Transformation
- Home workouts to top music
- Sports with pets
- To the music of "This I Can Do"
- Sports stunts
- Imitation sports

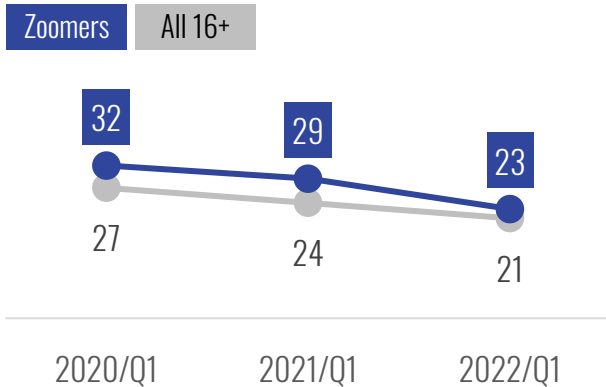
Source: [In-Scale Blog Top-100 Tic-Toc Trends for 2020](#)

ENTERTAINMENT OPPORTUNITIES HAVE DECREASED

The blocking of foreign social networks in Russia reduces the audience of popular games, contests, pranks, and quizzes. The audience of games in general cannot be called young people - in terms of the share of zoomers who have played the game and the general audience of 16+ age. And in the first quarter of 2022, the proportion playing among zoomers was even slightly lower, although overall we have not yet seen a tangible drop.

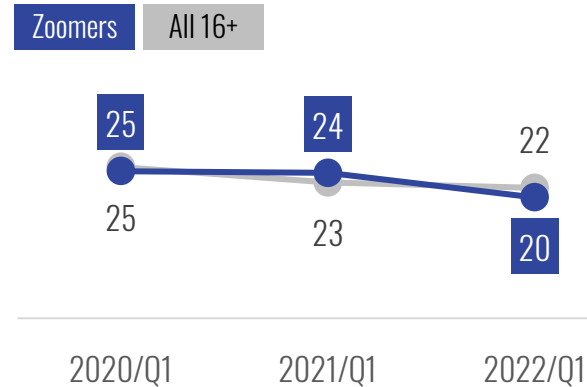
Pranks and competitions attracted a little more zoomers, but here in the first quarter of 2022, under the influence of blocking, the share of users among zoomers and among the entire audience of 16+ practically equalized. The decrease among zoomers is stronger than among others - minus 6ppts. This correlates with zoomers' demand for comfort and convenience, which has decreased noticeably due to the need to log in to social networks via VPN. And, unlike games, where the previously started activities often continue, contests and raffles tend to be one-time events and abandoning them is not as critical.

Participating in contests, quizzes, drawings for prizes in social networks for 3 months. (%)



Source: Ipsos, [OnLife](#), 2022/H1
Russians 16+, cities with a population of 100,000+, active internet users

Playing social networking games for 3 months. (%)



Source: Ipsos, [OnLife](#), 2022/H1
Russians 16+, cities with a population of 100,000+, active internet users



- A decentralized social network for yourself and your friends. On Your Own Hosting - Without the Internet. [>>](#)
- Dance Challenges, Streaming Concerts, and Listening to Music via Social Networks are popular among young people. [>>](#)
- For the hat, the zoomers are ready to teach each other how to crochet. [>>](#)



KOREA IN THE RUNET MIRROR: SIX MAJOR K-THEMES FOR RUSSIA

K-POP

- Korean pop music becomes more popular in Russia
- PSY kicked off K-pop in Russia
- BTS is the most famous K-pop group

DORAMS

- Korean series promote culture and increase interest about Korea in Russia
- "Squid Game" is the most famous drama of recent years

KOREAN COSMETICS

- The largest segment
- Korean multi-step care system
- Tissue masks and hydrogel patches came to us from Korea
- Decorative cosmetics (cushions, tonal creams)

KOREA

WHAT SOCIAL MEDIA IS TALKING ABOUT

Source: Ipsos. Social Intelligence Analytics
Collection and analysis of social media data (over 1 million messages).
Highlighting plots using text analytics approaches (AI-based).
Qualitative study of priority clusters.

KOREAN CULTURE

- K-pop and dramas increase Russian youth's interest of Korean culture
- Bloggers from both countries talk about Korean culture for Russians (YouTube vlogs: [The Tea Party](#), [Let's Go to Korea](#) by Marina Ogneva, etc.)

KOREAN FOOD

- Extensive selection of Korean cuisine in delivery
- Korean cuisine restaurants

APPEARANCE

- Elements of Korean fashion are becoming popular among young people: colored patches on the bridge of the nose, makeup, lenses of natural colors

EDUCATION

In search of a meaning



Work-Life-Study Balance matters

Unlike other generations, zoomers, are more motivated to enter the labor market earlier. In this regard, it is extremely important for zoomers to combine work with education, without losing the opportunity to enjoy life. Over time, work and education will become increasingly difficult to separate.

To college instead of university

Interest in studying at universities is decreasing against the backdrop of changing attitudes towards secondary professional programs. Post-school students want to spend less time studying and gain more practical skills as quickly as possible to start earning and pursuing a career.

Bootcamps.

Digital professions for six months

While college education involves studying for 1-2 years after 11th grade, a new educational form - bootcamps – assumes programs of six months only with a guaranteed employment at the end. The constant personnel shortage in the market will contribute to demand growth for this educational format.



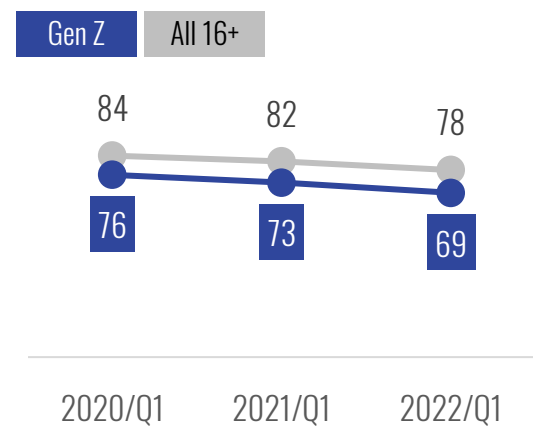
THE RELEVANCE OF WORK-LIFE-STUDY BALANCE

Gen Z have added a third element - Balance to the well-known Work-Life Balance, resulting in Work-Life-Study Balance. The triad reflects the request to start working and earning as soon as possible, combining work with getting the necessary education while not denying the personal pleasure and life comfort.

Ongoing global changes, affecting life and work, require constant new skills learning. However, the data shows overload and excessive intensity of new information. There is consequently a negative dynamic in the perceived importance of continuous life-long learning.

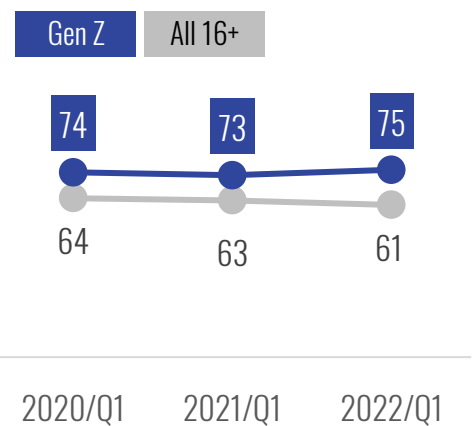
The search for a balance of life, work, and learning is reflected in the data, reflecting a drop in the proportion of Gen Z who combine both work and study. At the same time, the proportion of zoomers who are either studying or working is growing. The continued convergence of education and employment makes it increasingly difficult to separate the two.

The importance of long-life learning (%)



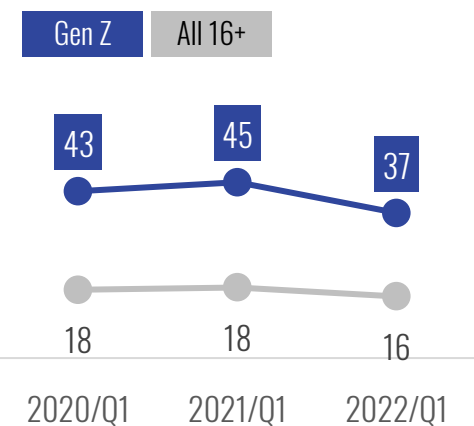
Source: Ipsos, [RusIndex](#). Russians 16-25, cities with population of 100,000

The 'Work hard and you will succeed' belief (%)



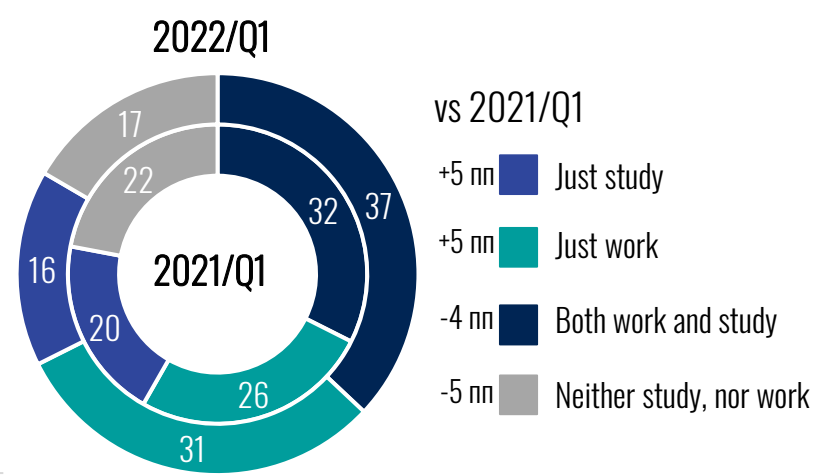
Source: Ipsos, [RusIndex](#). Russians 16-25, cities with population of 100,000

12-month goal is self-education (%)



Source: Ipsos, [RusIndex](#). Russians 16-25, cities with population of 100,000

Education and employment (%)



Source Ipsos, [RusIndex](#). Russian 16-25, cities with population of 100,000.

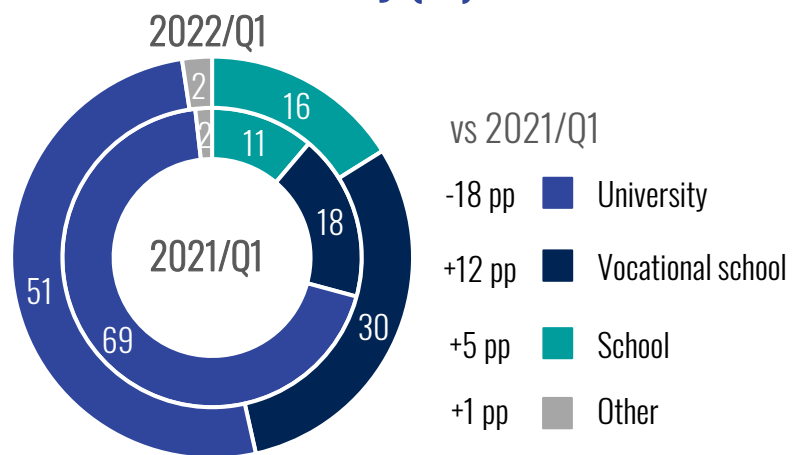


FROM HIGHER TO SECONDARY VOCATIONAL EDUCATION

Even though now obtaining higher education remains the predominant educational strategy among students, school graduates more often decide to continue their learning path in secondary specialized or vocational educational institutions. According to the RusIndex study, over the year, the share of those who reported studying at a university decreased by 18pp, while the share of students from secondary specialized institutions increased by 12pp. Every fourth parent reports their children's plan to receive secondary specialized education, whereas ten years ago only every fifth parent claimed so. The share of those planning to enter the university immediately after school has fallen by 13% in ten years (from 58% in 2012 to 45% in 2022 according to Superjob.ru).

The reason for such changes is the excessive overload of students at school, the meaning and value of which young people do not always understand, the difficulty of admission to budget places at universities, the high cost of education, insufficient understanding of the post-university development trajectory for young people. Also, perception of secondary vocational education as not prestigious, intended for not too smart and unpromising children is becoming a thing of the past.

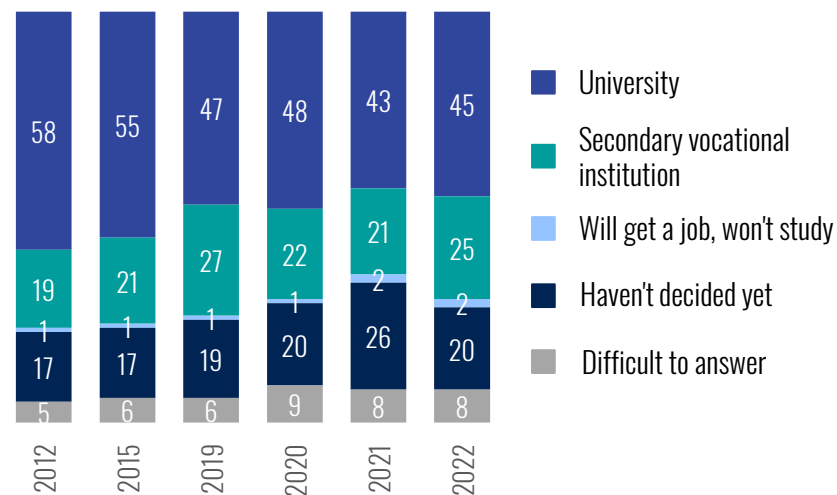
Where zoomers study (%)



Source: Ipsos. [RusIndex](#). Russians 16-25 y.o., cities with population of 100,000

Educational strategies of school graduates

After graduation, your child will continue studying in...



SuperJob Portal. March 21st — May 31 2022
Parents of 2022 school graduates. Russia (all districts)



SIGNALS

- According to the forecast of the Russian Ministry of Education Federation in 2024, colleges and technical schools in Russia will graduate more students than universities >>
- 20% of parents who can give their child everything, including paid higher education, choose paid education in secondary vocational institutions >>
- 100 future professions >>

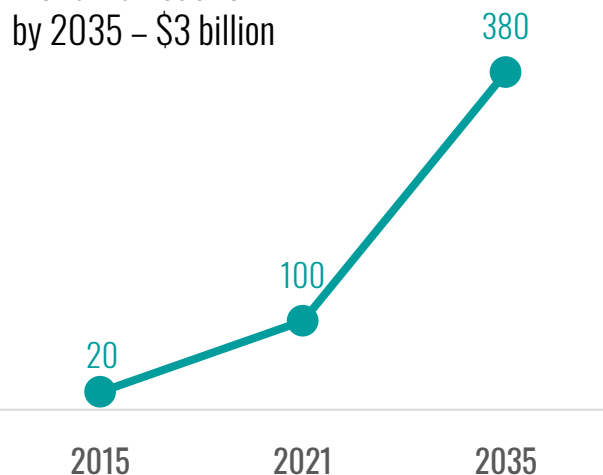
BOOTCAMPS. DIGITAL PROFESSIONS FOR SIX MONTHS

Considering the great zoomer orientation to start working as soon as possible after school, super-intensive and professionally aimed educational format of short-term bootcamps is of great interest to Gen Z. In Russia, the market niche of this originally American educational model is not saturated.

Domestic offers of such educational services based on foreign experience, being enriched with local ones, can effectively satisfy the demand of young people for short-term learning programs that meet the current employers' requirements and guarantee further employment once receiving a school certificate.

Bootcamps alumni growth forecast

World market size by 2035 – \$3 billion



Source: [SberUniversity](#), World

CASE OF SUCCESSFUL CODING BOOTCAMP IN RUSSIA



Elbrus coding bootcamp



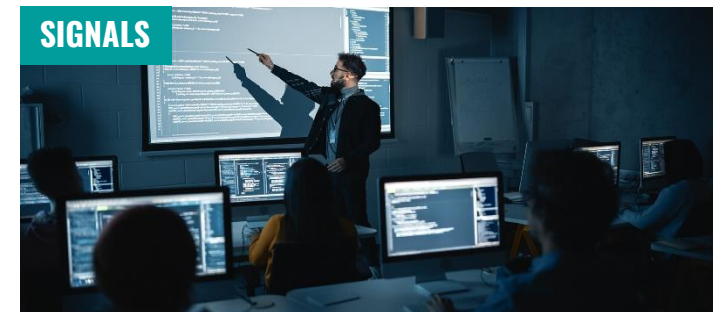
EDUCATIONAL EFFICIENCY IS CONFIRMED BY HSE



1017 Students graduated in 3 years
93% Students employed in 3 months
110 тыс. Alumis' salary

Source: [SberUniversity](#), World

SIGNALS



- In Russia bootcamp is a new format for mastering digital professions from scratch at 4-6 months intensive courses with guaranteed employment. Initially, bootcamps took place on campuses, but today they have switched to the format of online programs, to which universities, colleges and government agencies are connected [>>](#)
- The constant personnel shortage in the market will contribute to demand growth for this format. [>>](#)

4FUTURES EDUCATION



Foresight scenarios that we can see on the horizon in ten years

An artifact from the future



GROWTH



TRANSFORMATION



CONSTRAINT



COLLAPSE



EDUCATION. "4FUTURES" FORECASTS



GROWTH

DIGITAL PROFILES AND NO EXAMS

The digitalization of education continues apace. Educational institutions enrollment within a single educational ecosystem is now based on a digital profile of the person created from birth.

The digital profile accumulates all the information about person knowledge and skills, e.g., learning successes, aptitudes, talents and interests. At the moment of the transition to the next level, the graduate automatically receives a choice of several offers, where they are ready to be accepted for training, considering their preferences and capabilities recorded in the digital profile. Entrance exams are no longer the necessity. They are replaced by a technical comparative analysis of the applicants' educational profiles.



TRANSFORMATION

EMPLOYMENT JUST AFTER THE SCHOOL

The workplace is combined with post-secondary education. Employers now set the educational standards. The best CV decoration is a diploma of graduation from one of the leading ecosystems' corporate universities. Applicants are assigned to employers while they are still in school. All happens with the help of artificial intelligence that assesses whether a person's potential matches the requirements of the workplace.

A progressive training-work-day format is emerging taking place on the employer side and begins with a 4+4 format, the day equally divided into training and work. As the employee gains knowledge and experience, they gradually move to a 7+1 format (seven hours work, one hour education) and then to a full-time workday after graduation.



CONSTRAINT

FAST EDUCATION

Economic problems and falling incomes are forcing Gen Z to start working as early as possible in order to provide for themselves and help their families financially. Not everyone can afford to attend universities or even colleges due to its time and money consuming nature.

Short-term formats of no more than six months in length are most in demand, allowing people to start working as quickly as possible after school. Often such blitz-formats of education are offered in cooperation with employers who are ready to hire "fast" graduates with the necessary minimum of knowledge and who finish training the young employee without discontinuing work.



COLLAPSE

EDUCATION WITHOUT OVERLOAD

Accelerated progress with excessive stress due to the constant need to assimilate new information, learn and adopt new routines, comes into conflict with demand to maintain personal psychological balance and reduce the pace of life. Educational organizations are forced to comply with new legal standards for the maximum allowable daily level of stress for the individual. The volume and load of curricula is being revised, and students' life/study balance is being prioritized. The exhausting study and the question of how this knowledge will be useful in life are a thing of the past.

Education is now aimed at maximizing individual abilities and developing flexible skills. AI helps to remove mental overload and effectively use the productive energy of a person to study and work.



EDUCATION. ARTIFACT FROM THE FUTURE



BETTER TO LEARN WITH TV SERIES

Sophia got comfortable on the couch with popcorn, put on her virtual glasses, and turned on her favorite educational show.

Her homework for today was Chinese economic geography. The concept of cross-disciplinarity not only allows you to closely study the economic aspects and the government statistics, but also to learn about the lifestyle of the people living there. Virtual reality even enables you to talk to them, for example, to discuss what kind of TV series the local teenagers are hooked on.

Boring theory has become a thing of the past thanks to educational TV series with the most famous movie stars.

After finishing watching the series, Sofia heads off to school. Today is going to be interesting, since a hands-on seminar on the topic of the series will feature an executive from a large retail company where she would like to work. The same company is sponsoring the filming of several educational series.

FINANCE

Earning with pleasure



Money is an important indicator of success for zoomers

Zoomers understand that the social lift works faster, allowing them to achieve financial success in a shorter period. One in five would like to study financial literacy.

Prefer remote work, look for work in social media

The proportion of entrepreneurs, self-employed and freelancers is higher among Gen Z, but the proportion of those who received income from these types has declined over the past two years. Zoomers love remote work. Nearly one in five looked for work on social networks.

The crisis of 2022 cools interest in creative professions

In a crisis, zoomers consider stable wages and work in companies, sacrificing their interest in creative professions.

Zoomers invest bolder but entrepreneurial confidence is declined

Every second zoomer is ready to take a risk on the stock market, but only 13% have a brokerage account or an IIA, and this is 4pp less than a year ago. The willingness to open a business lost 3pp in two years, and the desire to lead – 7pp in the same period.



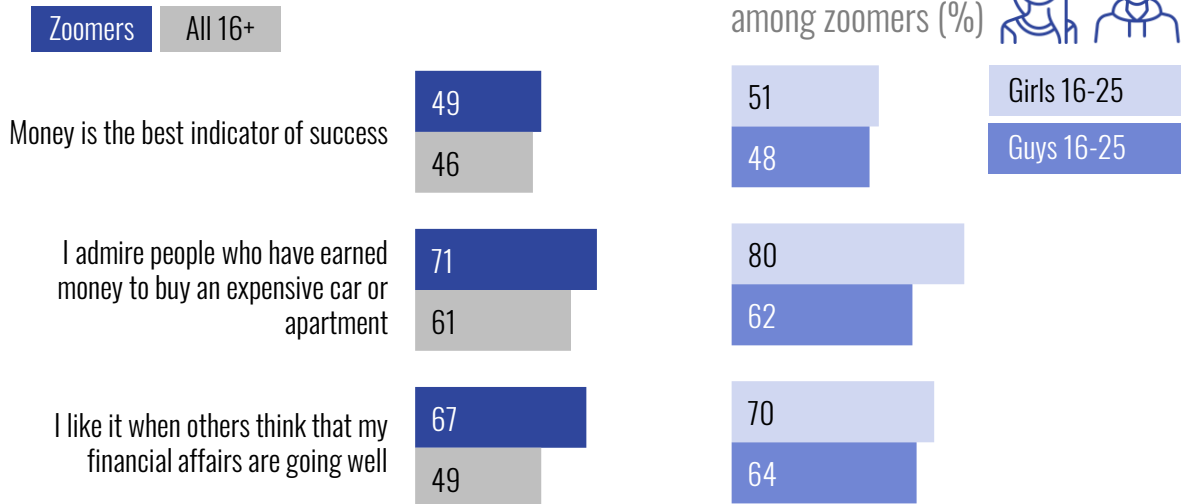
MONEY IS AN IMPORTANT INDICATOR OF SUCCESS FOR ZOOMERS

Every second zoomer agrees that money is the best indicator of success, and in this belief, they differ slightly from the general population. However, those who were able to earn money for an expensive apartment or car are greatly admired. Similarly, zoomers are much happier when others see that their financial affairs are in order. Girls are more sensitive to the financial well-being of themselves and others' than guys.

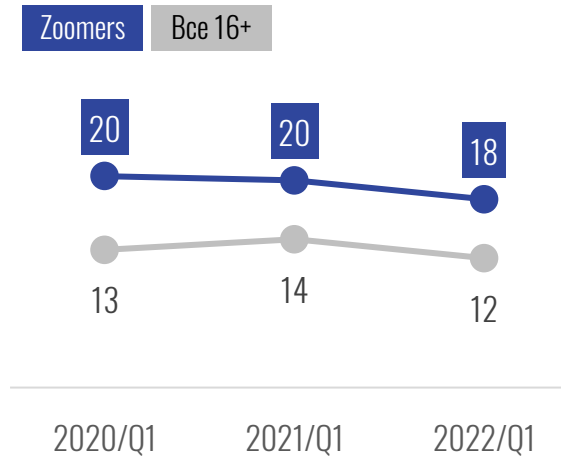
For those who consider improving financial literacy as their goal for the next 12 months, zoomers also have significantly higher rates than the general sample. Every fifth person is interested in learning how to manage personal finance within the next year. However, on the horizon of three years, interest in financial literacy is declining.

Attitude to money

Agreed with the statements (%)



Goal for the next 12 months: To increase financial literacy (%)



SIGNALS

- JP Morgan is the first bank to enter the metaverse. [>>](#)
- Alfa Message – get a bank card in 40 seconds without leaving your favorite messenger and by filling out just three fields. [>>](#)
- STEP N is a smartphone app that allows you to earn passive income while jogging in NFT sneakers. [>>](#)



EARNING AND PURSUING A CAREER SHOULD BE A PLEASURE

Employment remains the main source of income for Gen Z, although the percentage of employees is lower than among the general population. At the same time, the proportion of self-employed and freelancers among zoomers is higher than among all 16+. According to [HeadHunter research](#), more than half of Russian companies regularly cooperate with the self-employed, 42% of whom are young people. At the same time, over the past two years, the share of zoomers who received income from their own business, self-employment or freelancing has fallen by 2pp. Over the same period, the share of zoomers who received financial help from relatives also increased by 2pp.

Remote work among zoomers is significantly more in demand compared to the general population. On the one hand, zoomers have more opportunities to combine work and study. On the other hand, it meets their needs for freedom, independence and enjoyment of life.

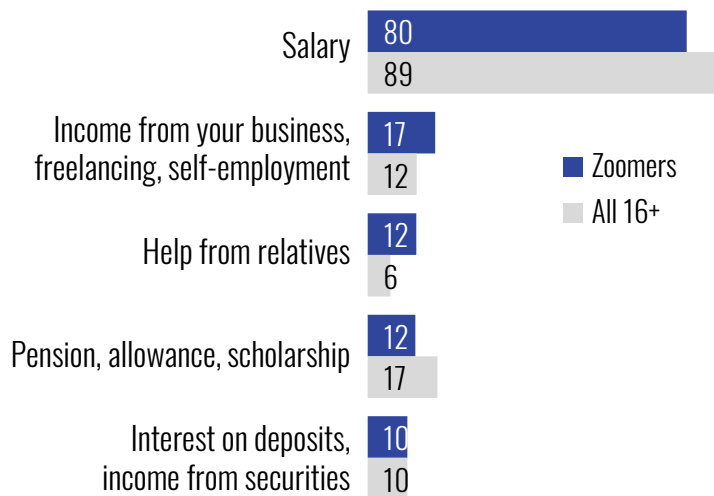
Looked for a job in social media

17%
zoomers

13% among
16+ in general

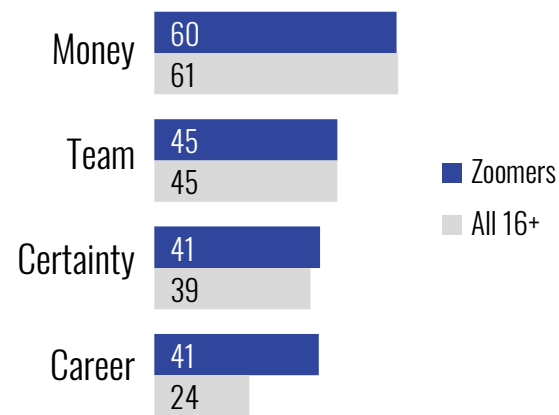
Source: Ipsos. [OnLife](#)
2022/H1

Sources of income (%)



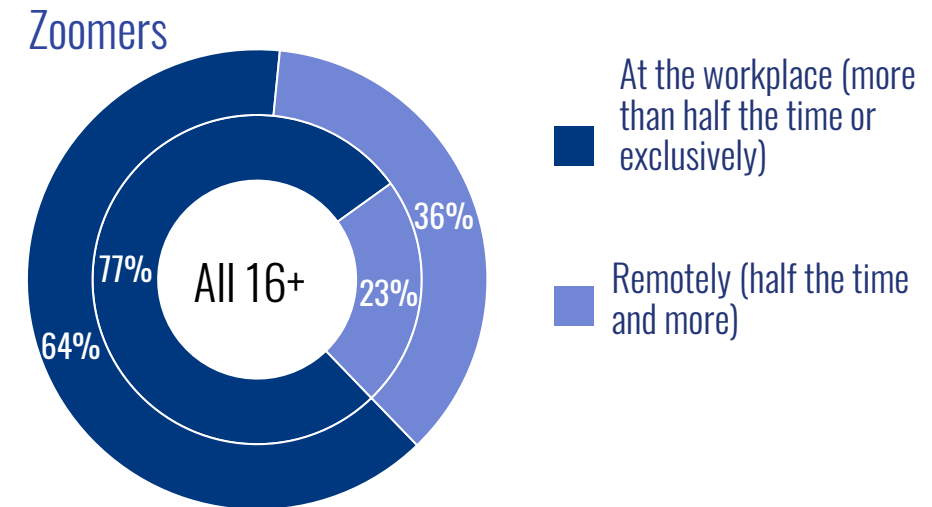
Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

Most important in the work (%)



Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

Work formats (%)



Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000



THE CRISIS OF 2022 COOLS INTEREST IN CREATIVE PROFESSIONS

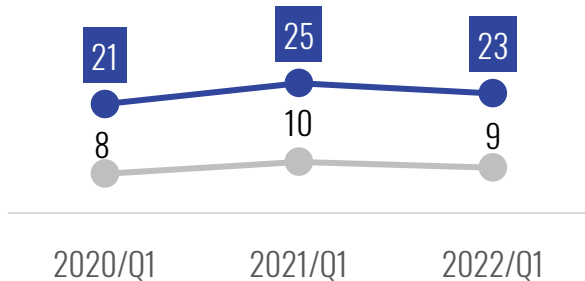
In accordance with the aspirations for creative self-expression and enjoyment of life, the proportion of people employed in creative professions is very high among zoomers - on average, one in four names the main job of a blogger, designer, photographer, etc. The coronavirus pandemic - with limited physical movement but unlimited access to social networks - has increased the employment of zoomers in these professions by 4pp. However, the crisis of 2022, which brought with it the blocking of foreign social networks, reduced the employment of zoomers in creative professions by 2pp.

At the same time, in 2022/Q1, the desire to work in such professions decreased dramatically – by 14pp in a year. Bloggers and cyberathlete players have lost most of their attractiveness.

Creative professions

Main work (%)

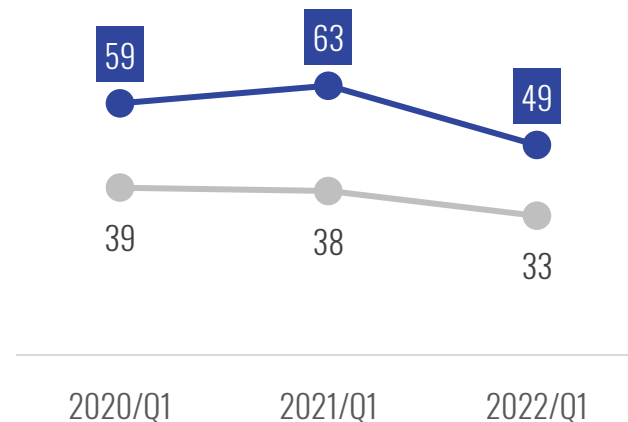
Zoomers All 16+



Creative professions

Would like to do (%)

Zoomers All 16+



Profession	Work 2022/Q1	Would like 2022/Q1	Would like vs 2021/Q1
Blogger	8%	17%	-5pp
Designer	6%	13%	+1pp
Photographer	4%	12%	-4pp
Cyberathlete	4%	10%	-6pp
Artist	4%	8%	-4pp

Source: Ipsos. [RusIndex](#).

Russians 16+, cities with population of 100,000

Professions: blogger, designer, photographer, model, cyberathlete, florist, writer, artist, stylist, makeup artist

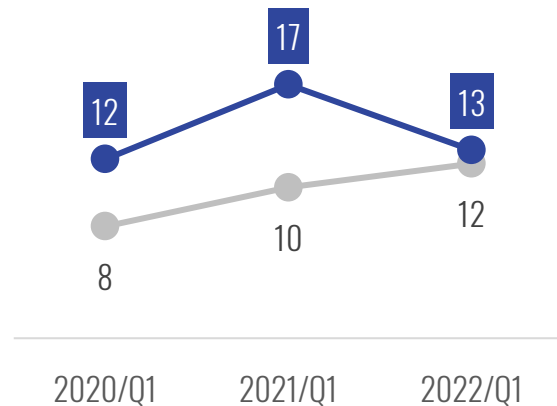
ZOOMERS INVEST BOLDER

Zoomers are open to more risky financial products like stock trading and investing. A steady growth trend is also observed among the entire population. But zoomers have a more pronounced investment request, again, due to the presence of an airbag in the form of parents and the absence of obligations to raise children and pay loans. Despite this, the crisis of 2022 scared away some of the young investors – Ipsos data shows a decline in the share of those who have a broker account or investment account, and also invest in securities.

Invest

Have a broker/investment account or savings invested in securities (%)

Zoomers All 16+



Source: Ipsos. [RusIndex](#).
Russians 16+, cities with population of 100,000

Buying stocks and securities is too risky

50%
zoomers

56% by sample 16+

Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

SIGNALS



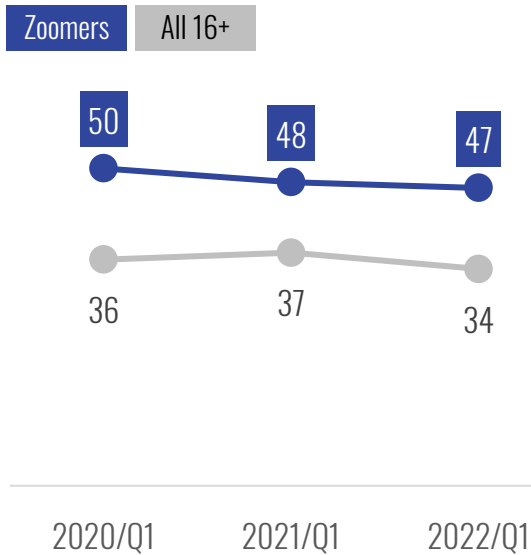
- Despite the crisis, the number of individuals with broker accounts on the Moscow Exchange is growing and has already exceeded 20.4 million (+629.2 thousand in June 2022). >>
- In the US, a growing number of young investors (business angels) are investing in ideas that can make the world a better place and at the same time expand their useful contacts and gain experience in participating in socially significant projects. >>
- CNBC launches CNBC Next Generation 50 index, made up of securities of companies that play a key role in the lives of millennials and zoomers. >>

BUT ENTREPRENEURIAL CONFIDENCE IS DECLINED

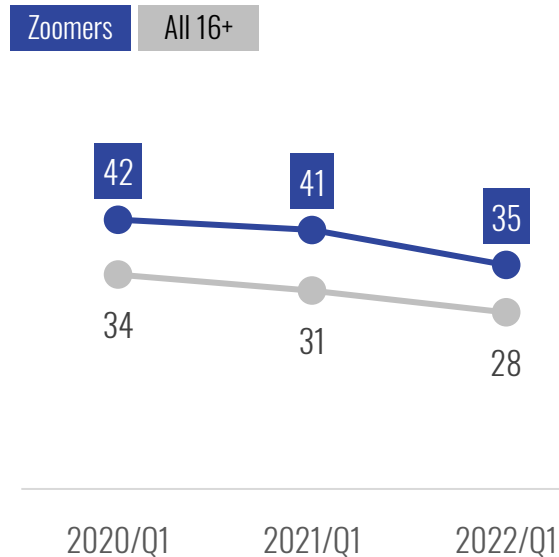
The perception of what is important in work is the same for zoomers as for the general population. The exception is a career in which zoomers are more interested than others.

Zoomers have a significantly higher proportion of people who believe they could start their own company. This also correlates with their value profile. However, the data show that crises cool such self-confidence: in three years, the propensity to organize their own business has decreased by 3 pp. At the same time, the share of those who say that they like to lead people has also fallen: in 2022/Q1, 35% of zoomers thought so, which is 7 pp lower than two years ago. This may indicate that their own company is needed not to solve large-scale tasks, but to go into self-employment and freelance.

Confident they could start their own company (%)



Like to lead people (%)



SIGNALS



- Former teacher of drawing and fine arts from Cheboksary Lena Lezhneva launched her own brand of children's clothing. [>>](#)
- The founder of the Che Za Quest project, Nikita Slavnov, attracted those wishing to participate in an adapted version of the Squid Game. [>>](#)

4 FUTURE FINANCE



Foresight scenarios that we can see on the horizon in ten years

An artifact from the future

FINANCES. "4FUTURES" FORECASTS



GROWTH

YES, IT IS POSSIBLE

Every day, consumers receive more and more personalized offers for each of their financial needs: from buying real or virtual sneakers using installment plan, to shared gift purchase for a mutual friend or a loan to buy pixel land.

"Personal firewalls" have become very popular - virtual assistants that process a flurry of imposed offers. These assistants support "silent periods" when the user does not see incoming offers, compare different financial products, keeping only the most winning combinations in the user's field of vision.

Users also love the feature when the "personal firewall" sends a counteroffer to the user's favorite brand to cooperate on the terms of another financial brand which offered better terms. Yes, that's possible too!

CONSTRAINT

BOLD STARTUPS

Due to the ongoing economic crisis, large corporations are reducing investment in innovations. These niches are occupied by ambitious startups that challenge market constraints and are ready to launch simple and fast agile innovations. Often such startups are created by very young founders who are burning with their ideas, due to lack of experience they are not afraid of possible problems, and financial airbag of parental support allows them not to be afraid of complete failure.

Measures of state support for innovative startups are being formed, legislation is being adapted, creating a more comfortable environment for micro-business, and proposals for sharing resources for their production activities are being developed. Banks offer flexible financial programs and support tools.

TRANSFORMATION

WHAT GENERATION IS YOUR CHIP?

The rejection of paper money and plastic cards and the introduction of transnational cryptocurrencies allows to make purchases using biometric identification and voice control at any time and in any place, including metaverses. Interaction with organizations and brands is carried out through a single point of entry, which eliminates the use of applications and other tools that require installation on devices and redundant manipulations.

Quantum encryption is being actively developed to guarantee the security of transactions, which are often at risk due to increasing cases of cyberterrorism. Implantation of chips is gaining popularity as an alternative to biometric data to increase the protection of personal information.

COLLAPSE

ECOSYSTEMS DON'T GIVE UP

The proliferation of ecosystems around the big banks has come into conflict with the needs of the younger generation to "go against the mainstream." Young people will trust independent niche brands more, not wanting to give all their funds to monopolists, despite the declared benefits of better personalization when all customer resources are managed by one ecosystem.

In response to this challenge, ecosystems create financial private labels or purchase niche brands to work with the younger generation "undercover".

FINANCE. ARTIFACT FROM THE FUTURE



GROW AND EARN

Maria was worried that her daughter Sonya, a public high school student, like all her classmates, was spending too much time in Meta'Million, the most popular metaverse among teenagers.

Of course, this worries all parents, but pride in their kids' success calms them down a bit.

Today, in half a day, Sonya managed to earn 18 bonuses in the crypt, correctly distributing her metamoney across various financial games.

Bonuses can be received if you know how to correctly form a portfolio of metacurrencies and investments, as well as complete tasks from various banks. Sonya has even chosen a bank in the metaverse where she will transfer her savings.

After the age of 14, the girl will be able to continue using metamoney or withdraw it to a real account.

FOOD

Contradictions on a plate



Diets as a way of life

For 3 years, the proportion of normal-weight zoomers has fallen by 8 pp, while underweight ones have increased by 7 pp. But at the same time, the proportion of people with obesity has doubled.

Fast food does not interfere with healthy lifestyle

Fast food restaurants are in the top in attendance among zoomers. Celebrities support the passion for fast food, opening new outlets.

Remote work affects nutrition

Zoomers cannot be called very active users of fashion delivery, but they are more loyal to frozen foods.

If tea, then with additives

Zoomers prefer tea over coffee. But by all means – with additives.

Innovations in nutrition. Intentions do not translate into consumption

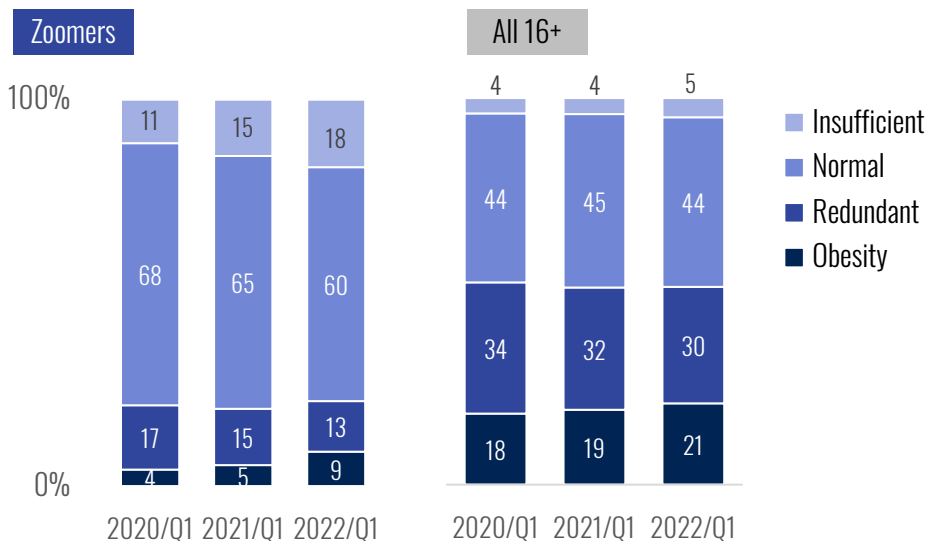
Despite a small increase in the readiness of consumption of most types of innovative nutrition, the data do not show an increase in real consumption.

DIETS AS A WAY OF LIFE

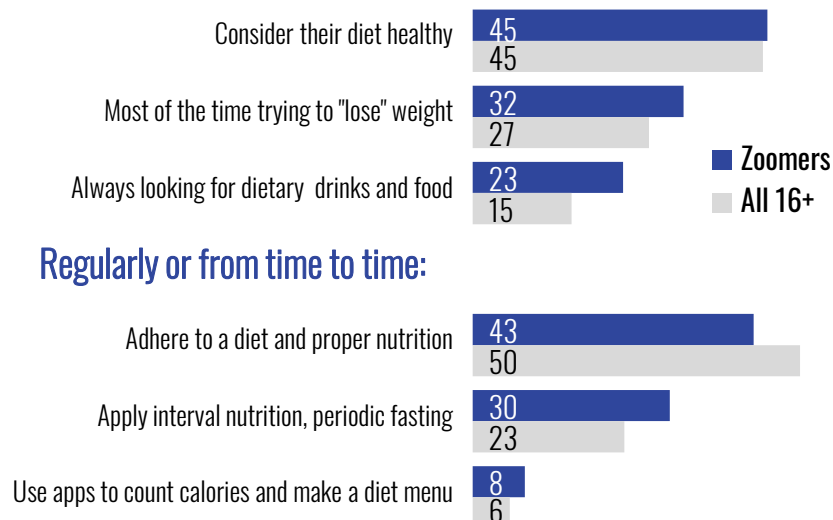
Even though the proportion of people with normal weight among zoomers is higher than among the general population (60% and 44%, respectively), almost a third of zoomers – and this is significantly more than the total sample – say that they try to lose weight most of the time, and almost one from four is looking for dietary products or drinks, which also significantly more than among the 16+ population. At the same time, among zoomers, the proportion of those who regularly or occasionally adhere to diets or proper nutrition is significantly less than the general sample. Indeed, in this group, the real need for diets is less pronounced due to a higher proportion of people with normal weight and a lower proportion - overweight and obese.

However, also among zoomers, the data show a higher proportion of adherents of radical types of nutrition: interval nutrition and periodic fasting. Unlike the other stable indicators for the year, there is a positive increase of 2 pp. As a result, we see in the data an increase in the proportion of people with a low body mass index among zoomers. The reduction is due to the proportion of zoomers with normal weight. At the same time, the continuation of the trend towards a passion for fast food and body positivity shows a doubling in three years of the proportion of obese zoomers.

Body Mass Index (%)



Healthy food and diets (%)



- СИГНАЛ**
- Vegan diets are one of the sources of weight loss. >>
 - Belgorod scientists have developed a recipe for yogurt with nettle. >>
 - The diet food icon increases the amount eaten. >>
 - The trend of respect for your body gives birth to a new type of diet – intuitive nutrition. >>

FAST FOOD DOES NOT INTERFERE WITH HEALTHY LIFESTYLE

Fast food continues to be a top nutrition format for young people, despite the relevance of proper nutrition, diets and healthy lifestyle. Fast food formats not only take the audience away from restaurants with a higher average receipt, playing off another round of forced propensity to save, but also introduce healthier options to the menu – vegetable cutlets, vegetarian and vegan options, burgers on black/grain rolls or without bread at all.

Interestingly, zoomers, in comparison with the general population, are also less likely to refuse to eat out and save on it. In this group, the proportion of those who increased their spending on catering is twice as high, and 39% have not changed anything in the difficult economic situation of the beginning of 2022.

Fast food is considered disgusting

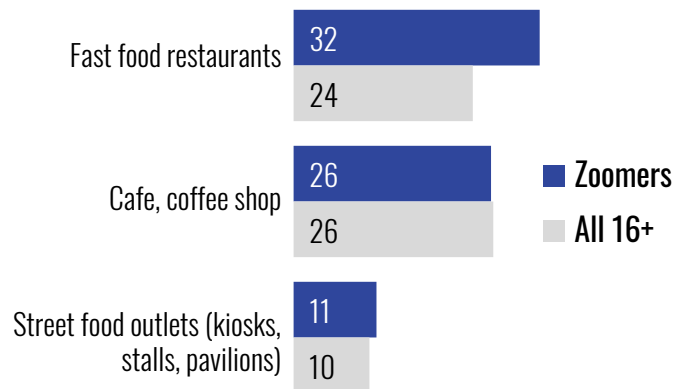
21%
zoomers

29% among 16+ generally

Source: Ipsos. [РосИндекс](#). 2022/Q1

Fast food is most popular among zoomers

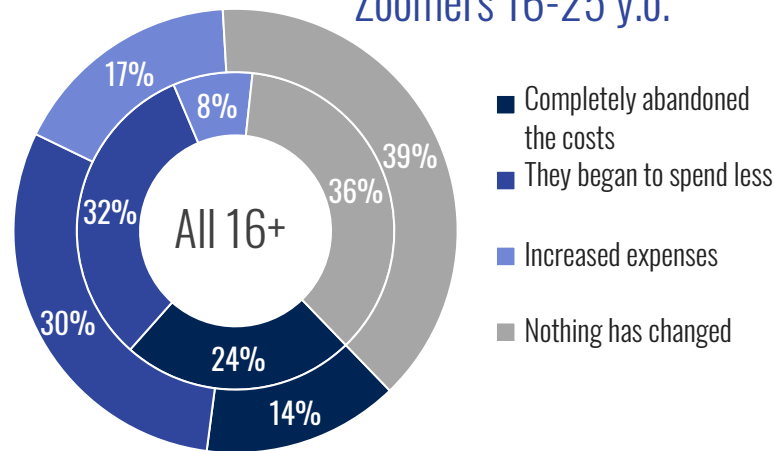
Visited at least once in the last 3 months (%)



Source : Ipsos. Research [РосИндекс](#). 2022/Q1
Russians are 16+, cities with a population of 100 thousand+.

Eating out. Saving formats

Zoomers 16-25 y.o.



Source : Ipsos. Research [РосИндекс](#). 2022/Q1
Russians are 16+, cities with a population of 100 thousand+.

СИГНАЛЫ



Zoomers are guided by the opinion of celebrities. Timati ([Black Star Burger](#)), Garik Kharlamov ([Hot Dog BullDog](#)), Khabib Nurmagomedov ([M-eat by Khabib](#)) and others are developing their burger and sausage chains. Timati also became a co-owner of [the former Starbucks coffee chain](#).

Taking advantage of the support of the Moscow Government, local cafe networks plan to open new outlets more actively after the departure of foreign players.>>

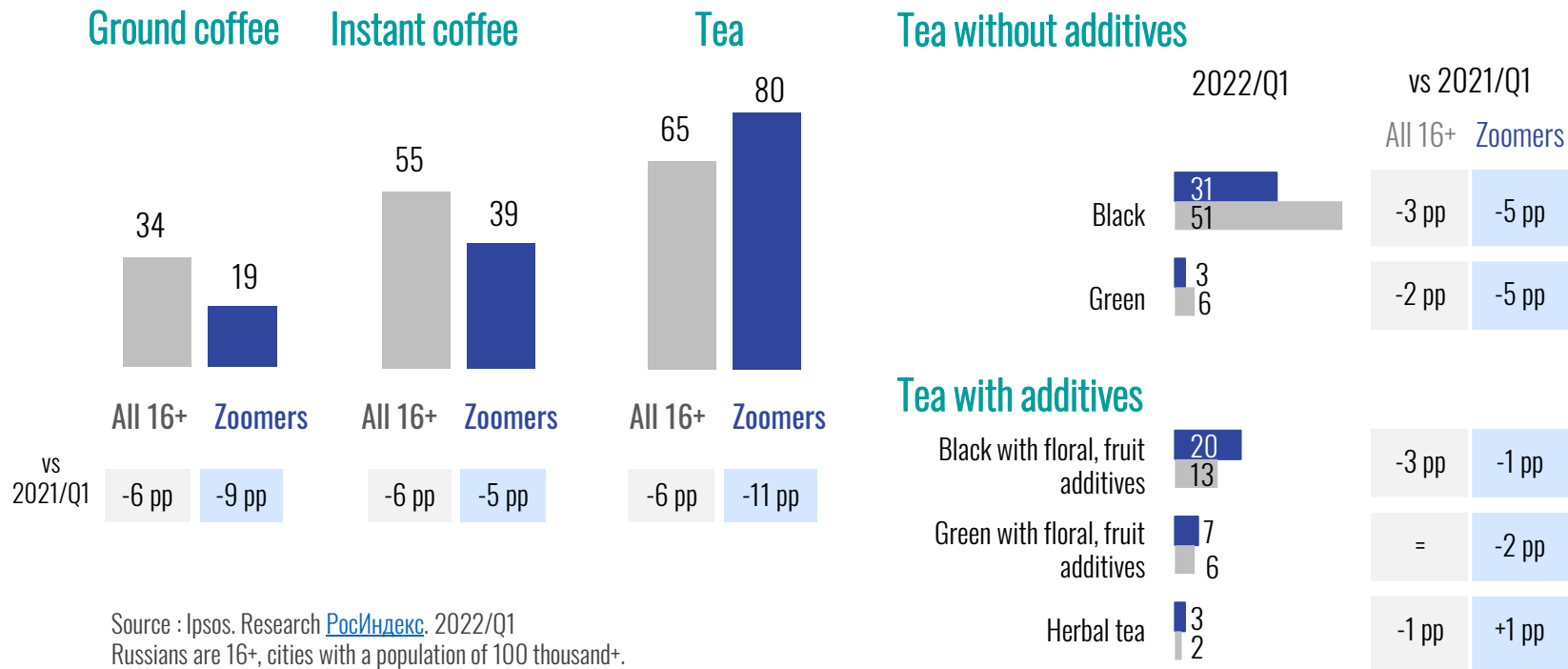
At the same time, Moscow restaurateurs do not give up trying [to create useful cafes as a substitute for fast food](#), and Burger King in Madrid opens a vegetarian branch – [Vurger King](#).

TEA WITH ADDITIVES – THE TERRITORY OF THE ZOOMERS

In Russia, the share of coffee and tea consumption among both zoomers and the general population has decreased. The decline in the first quarter of 2022 is associated with higher prices due to a failure in the supply of these products. Measurements are not active adherents of coffee; tea is more typical for young people. The favorites are teas with additives. Pure teas – black or green – are less popular.

Coffee and tea consumption(%)

For the last 3 months. 2022/Q1



SIGNALS

- Russians began to drink less coffee due to rising prices. [>>](#)
- New coffee category – bottled extract for adding to water or milk. [>>](#)
- The growth of coffee production and consumption around the world threatens flora and fauna. Scientists of the Finnish Research Center have created a coffee drink from cell cultures with nutrients. [>>](#)

Source : Ipsos. Research [РосИндекс](#). 2022/Q1
Russians are 16+, cities with a population of 100 thousand+.

REMOTE WORK AFFECTS NUTRITION

Zoomers cannot be called adherents of food delivery from shops and ready-made food from cafes and restaurants - older households often order food home, and zoomers prefer to spend time together with friends in cafes or more economical places. Delivery formats are rather more typical not so much for zoomers as for people working remotely, regardless of age.

Somewhat higher among the audience of zoomers is the share of consumers of ready-made food sets with calculated calories and nutritional composition, as well as designers for cooking according to recipes. However, even here the share of consumers is small, since these kits have a huge amount of excess packaging and contradict the "green values" of zoomers. Modern freezing technologies make zoomers very loyal to frozen foods.

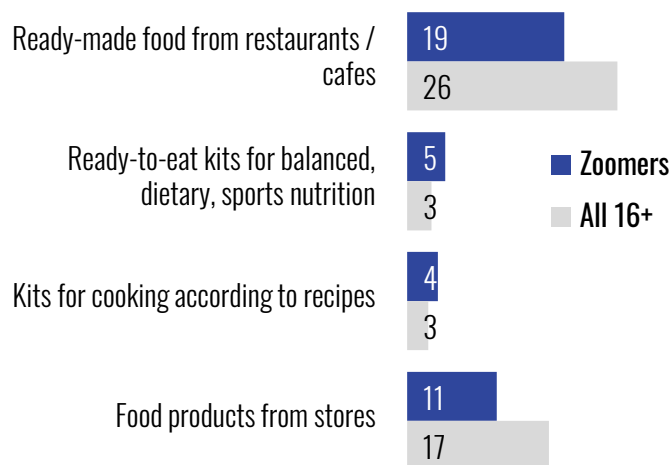
46%

zoomers

Believe that "frozen food is no worse than fresh"

38% for all 16+

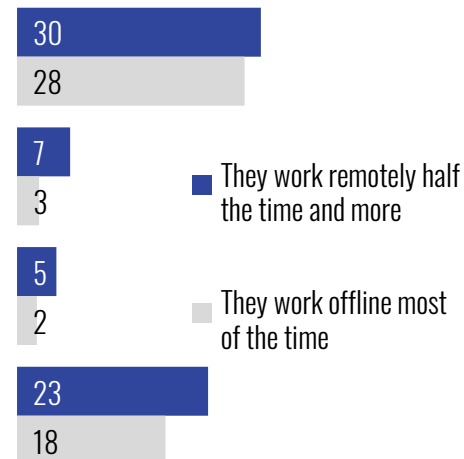
Ordered delivery (%)



Source : Ipsos. Research [OnLife](#). 2022/H1
Active Internet users 16+ Russian cities with a population of 100 thousand+

Ordered delivery(%)

Working users



Source : Ipsos. Research [OnLife](#). 2022/H1
Active Internet users 16+. They work in Russian cities with a population of 100 thousand+

СИГНАЛЫ



- "VkusVill" launches food delivery from restaurants that coincide with the brand in their approach to food quality. >>
- "Yandex.Food" will launch premium delivery from restaurants. >>

Source : Ipsos. Research [РосИндекс](#). 2022/Q1
Russians are 16-25, cities with a population of 100 thousand+.

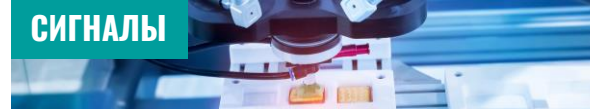


INNOVATIONS IN NUTRITION. INTENTIONS DO NOT TRANSLATE INTO CONSUMPTION

At the end of the year, there were no significant changes in the consumption of most innovative types of food. Zoomers are still more active in consumption and willingness to consume the most innovative types of food. But the attitude to organic farm products and home-grown food coincides with the zoomers and the general population.

Sugar substitutes (13%) and vegetable substitutes for dairy products (10%) are in the top for the use of zoomers. Interestingly, every tenth zoomer also reported the use of personalized nutrition – probably many people understand this as an individually selected diet with the help of nutritionists and specialized consultants. The largest increase in the readiness of use among zoomers is observed in the categories of sugar substitutes and vegetable meat substitutes.

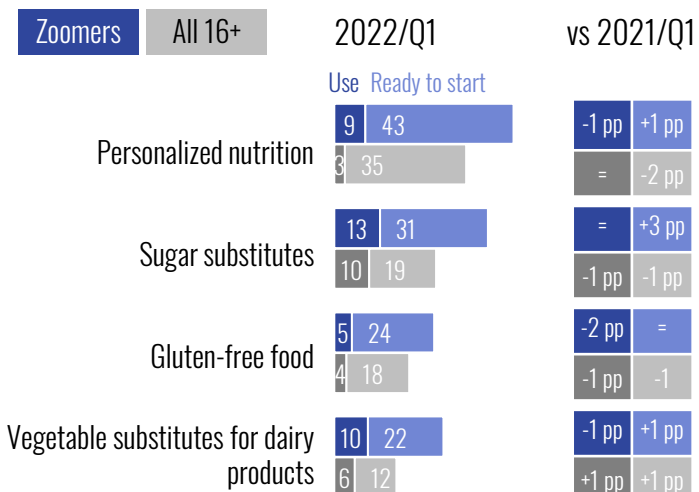
It is noteworthy that among the general population, organic farming has lost 5% of its willingness to use, which may indicate, on the one hand, unwillingness to overpay, on the other – distrust of organic farming and whether its products as pure as claimed.



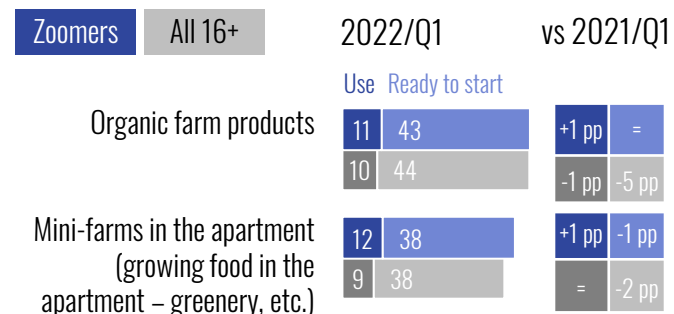
- СИГНАЛЫ**
- Arkeon Biotechnologies startup has learned how to turn CO2 into ingredients for food.>>
 - Spiral-shaped chocolate printed on a 3D printer is an experiment in the study of "edible metamaterials".>>
 - Startups in the United States began to produce edible dishes instead of disposable. >>

Usage and readiness to start using(%)

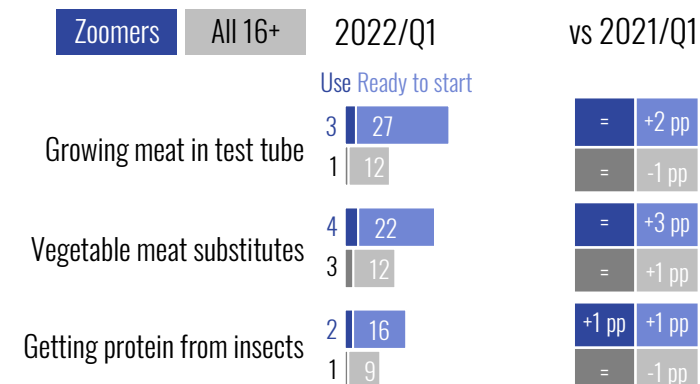
Products "without"



Pure organic



Food saving the planet



4FUTURES FOOD



Foresight scenarios
that we can see on the
horizon in ten years

An artifact from
the future



GROWTH



TRANSFORMATION



CONSTRAINT



COLLAPSE



FOOD. "4FUTURES" FORECASTS



GROWTH

CULTIVATE!

Cultivated products are gaining popularity and becoming mass-produced. With the scale-up of production, "food from a test tube" becomes more affordable than food obtained by traditional methods. A significant expansion of the assortment and the ability to add previously unavailable products to a typical diet removes the barrier to "fake" food. Now people do not buy, for example, a piece of meat, but a set for its home cultivation, and they can adjust the taste and nutritional properties themselves.

Master classes on home cultivation are a new trend in the info business. Every student knows how to grow probiotics in a jar or to ferment tea at home.

Discussing novelties of bacteria and fungi for home cultivation of food becomes as natural as talking about the weather.

TRANSFORMATION

ECOSYSTEM «HEALTHY VIBE»

Food manufacturers, biotechnological, pharmaceutical, medical and IT companies have joined together in the Healthy Vibe ecosystem within the framework of the 100 Years of Health program!

Sugar, butter and fast carbohydrates on the shelves have been replaced by their useful substitutes. The information on the packaging about the effect of the product on human physiology is also mandatory, as is the nutritional composition and calorie content. Alternative ways of obtaining "healthy" energy are common, for example, a food patch.

Tracker gadgets are an integral part of the products and services of the Healthy Vibe ecosystem. They store data on the health status of a particular person, the properties of all products /dishes, information about the impact of these products on various organs of a particular person, give personalized nutrition recommendations and track their implementation.

CONSTRAINT

TOM YAM WITH TURNIPS

Sanctions and logistical restrictions, as well as the further fragmentation of the world, make it difficult for Western food products and components to be produced, which leads to even higher prices for such goods. Russian food manufacturers and retailers differentiate product lines for a wide range of consumers in order to meet the needs for diversity.

On the one hand, traditional and endemic products are being rediscovered, for example, turnips, rutabaga, spelt, local cheeses, certain types of freshwater and marine fish. On the other hand, empty niches are filled with traditional or adapted Asian goods imported from India, China, ASEAN countries, etc. A new Russian fusion is born, combining modesty and orientation.

COLLAPSE

TASTES ARE NO LONGER DISPUTED

Food, which traditionally had a reconciling and unifying function ("to break bread together"), becomes a "bone of contention" for vegans and meat-eaters, healthy lifestyle and hedonists, supporters of elite and mass organics, religious peculiarities in food.

Manufacturers and retailers face a difficult task to satisfy all the requests of small groups without losing business efficiency. New technologies are emerging that allow, on the one hand, to minimize production costs through the creation of a universal synthetic nutritional product "human food", on the other – through separately sold flavor additives and AR/VR to make the process of absorbing synthetic food adaptable to any requests of niche groups

FOOD. ARTIFACT FROM THE FUTURE



HOW TO SPEND 400 KCAL

Tanya has been "hypnotizing" the dashboard for several minutes trying to choose what she wants for dinner. According to the regime, she still had about 400 kcal, which can be easily turned into any food that exists on the planet.

Scrolling through the wheel of taste characteristics from banal turkey to reindeer meat, Tanya decides to postpone experiments and stop at an almost boring well-done steak, which tastes like something between pork and beef.

Having mixed the necessary ingredients in a special compartment, Tanya sits down on a chair, fixing her gaze on the working device. The steak is cooked for only 3 minutes, but the time, as if mocking a hungry person, flows like jelly. The interactive image of the process of forming meat fibers of the desired taste and fat content in online mode also aggravates the situation. And now, the tedious wait is already coming to an end, the meat is already enriched with natural flavors, which is why the sharp smell of fried steak with a crust spreads throughout the kitchen, sharpening olfactory receptors to the limit.

In absolute silence, there is a saving squeaking, which means that the dish is ready, and Tanya sits down at the table, opening an article with the intriguing title "Hypermarkets of the past".

RETAIL

Technologies, emotions and awareness



Online-natives and offline-tourists



Zoomers are more about to trust online shopping. Offline is for impressions. Online shopping experience could have been better.

Subscription purchases. High potential at high distrust

Zoomers are showing interest in using new ways to pay for purchases. In particular, they are already more active in using subscription buys which have high potential but are also distrusted for their inability to cancel a subscription quickly.

Zoomers love foreign brands but are deprived of the opportunity to buy them

Russian brands have yet to prove their quality and competitiveness to zoomers. Involving celebrities can help with this process. Zoomers do not abandon the own-brand products which satisfy their demand for savings. But because of the love for brands, "masked own-brand products" have a great potential.

A thousand and one reasons to love resale

Resale platforms meet several zoomers' needs at once: their love for foreign brands, their desire to save money, and their interest in conscious consumption.



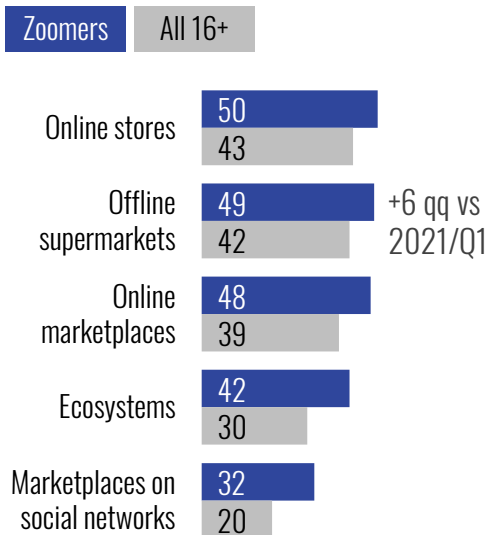
ONLINE-NATIVES AND OFFLINE-TOURISTS IN SHOPPING

For zoomers, offline stores are the places to hang out and have fun, while online is a basic place to shop. In the absence of interesting offline experiences young people are gradually leaving malls. However, online is not fun for the young either: even though they easily navigate online and trust it more than the general audience, they are more likely to say that shopping online is more difficult. The same pattern can be seen globally.

Considering this, it's important for brands to help zoomers have interesting offline and online experiences. An integrated shopping may become a solution that improves the experience of interaction with brands.

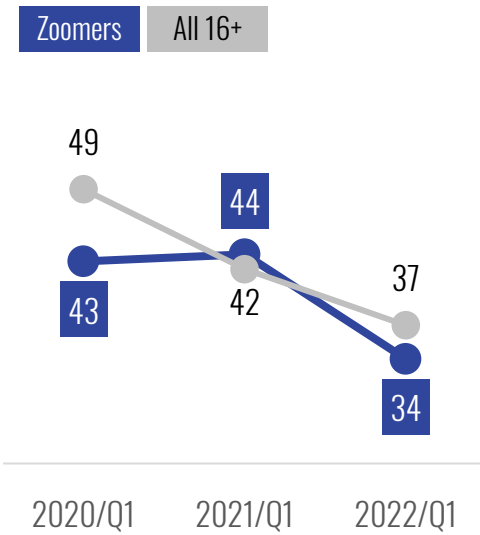
Channel trust

Top-2 (on a 5-point scale)
RusIndex. 2022/Q1



Shopping malls attendance drops

Over the last 3 months (%)



Online experience could have been better

24%

of zoomers

find it more difficult to shop online than at usual offline shops

19% in 16+ generally 2022/Q1



SIGNALS

- In 2022 Levi's opens shops focused on creativity and involvement in fashion and style. >>
- "Yandex. Market" is testing a hybrid mini-stores format selling electronics at pick-up points. >>
- Logistics center and interactive showroom from Citylink presents a new all in one format in St Petersburg. >>

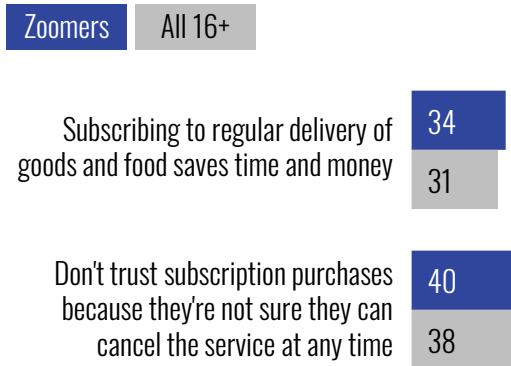
ZOOMERS WELCOME NEW TECHNOLOGIES IN SHOPPING

42% of zoomers admit that they are always in the search of technical novelties that make life more interesting. This is significantly higher than among the general population (32%). This interest of young people also manifests itself in new ways to pay for purchases – like paying through a quick payment system, paying in apps, Face ID, etc.

Simultaneously, a high interest is shown in subscription purchases. One in three zoomers believes that subscribing to regular delivery saves time and money. However, only 4% of zoomers are already subscribed to nonfood delivery, while 3% are subscribed to food delivery. This speaks to the high potential of this type of pre-payment purchase, although one can't fail to notice that zoomers have a higher level of distrust and a fear that subscriptions can't be quickly and easily cancelled. Brands planning to promote subscription purchases need to work on removing this hurdle.

Subscription buys have great potential

Attitude (%)



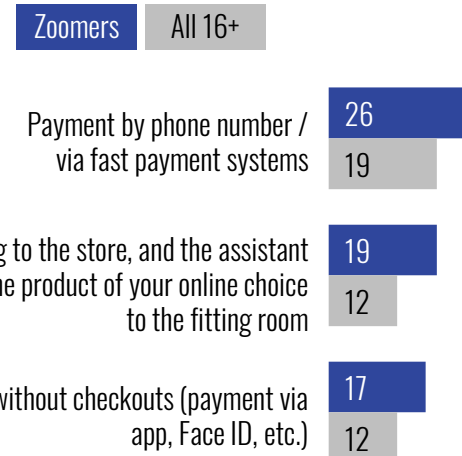
Source: Ipsos. [OnLife](#). 2022/H1
Russians 16+, cities with a population of 100,000+, active internet users

Using (%)




Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

Most exciting when shopping (%)



Source: Ipsos. Research [New Reality](#). June 2022
Russians 16-25 y.o., millionaire cities of Russia

SIGNALS



- Biometric payments, hyper-personalization: how online shopping will change in 5 years. [>>](#)
- Amazon released a new "smart" shopping cart: it calculates the cost of purchases, accepts payment and helps with navigation. [>>](#)
- Utkonos online store has a voice assistant. [>>](#)
- Alice in the search "Yandex" will help to decide on purchases. [>>](#)



THEY LOVE FOREIGN BRANDS BUT ARE DEPRIVED OF THE OPPORTUNITY TO BUY THEM

Compared to the general audience, zoomers prefer foreign brands more and believe to a greater extent that the quality of Russian goods is lower. Among zoomers there is a smaller share of those who are guided by discounts and special offers when buying. However, money had become scarcer, and price became more important so zoomers do not mind buying fakes of famous brands. In the group of 16-25 years old the share of those who encountered fakes increased by 5 percent over the year, while among the population 16+ the share of such people did not change over the year.

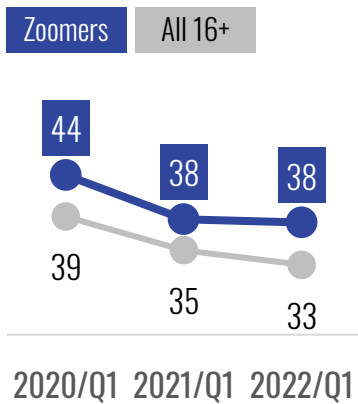
For many years, Russian manufacturers carefully disguised their goods as foreign brands, since there was an opinion that they were of higher quality. Therefore, local brands imitated European and American names (for example: Respect, Carlo Pazolini, etc.). Now Russian manufacturers are gradually coming out of the shadows, still actively using the Latin alphabet to spell Russian words (e.g.: Blizhe, Chaika, Kukla, Ritmika, Indiwd, Levitacia, etc.). The fact that zoomers rely more than others on the opinion of celebrities when making purchasing decisions opens up opportunities for Russian brands to grow.

Often come across counterfeits of well-known brands

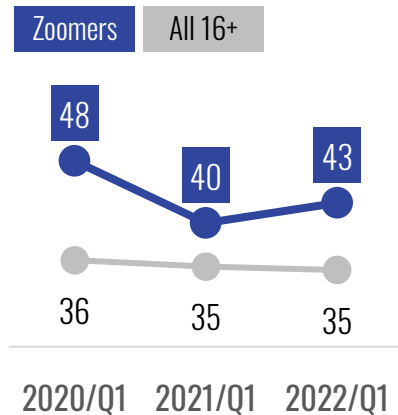
31% of zoomers

+5 qq vs 2021/Q1
22% among 16+ generally
Source: Ipsos. RusIndex. 2022/Q1

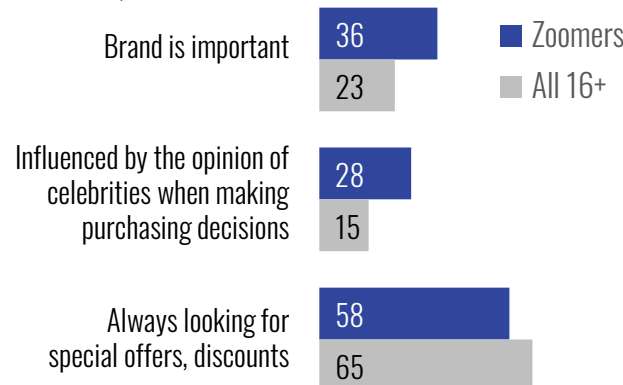
Prefer to buy foreign brands (%)



Believe that the quality of Russian goods is lower than that of imported ones (%)



Brand importance. The influence of discounts and celebrity opinions on the purchase (%) 2022/Q1



SIGNALS



- Yandex.Market has a section with domestic brands called 'Univermag', while Lamoda.ru has created a section called 'Showroom of Russian Designers'.
- Celebrities continue wearing Russian brands. >>
- A model Alesya Kafelnikova starred in an advertisement for the Russian clothing brand Love Republic. >>



ZOOMERS DO NOT GIVE UP ON OWN-BRAND PRODUCTS

As during other crises, the consumption of own brands in the current period is growing because buying own brands is traditionally seen as one of the saving strategies. But own brands are evolving. Retailers produce under their own brands not only "first value" products but also analogues of famous brands that are not inferior to them in design and quality. Own-brand products are bought not only out of a desire to save money but also in search of shopping diversity.

Zoomers don't give up on own brand products and buy them as frequently as people of other ages. Most often they buy these brands in the food category. The combination of contradictory preferences as a focus on price combined with an emphasis on quality and the preference for branded goods makes zoomers an attractive target audience for "masked" own brands, which both satisfy zoomers' demand for savings and do not take away the feeling of purchasing a branded product.

Buy own brand products from time to time

24%
of zoomers

+5 pp vs
2021/Q1

25% among
other ages

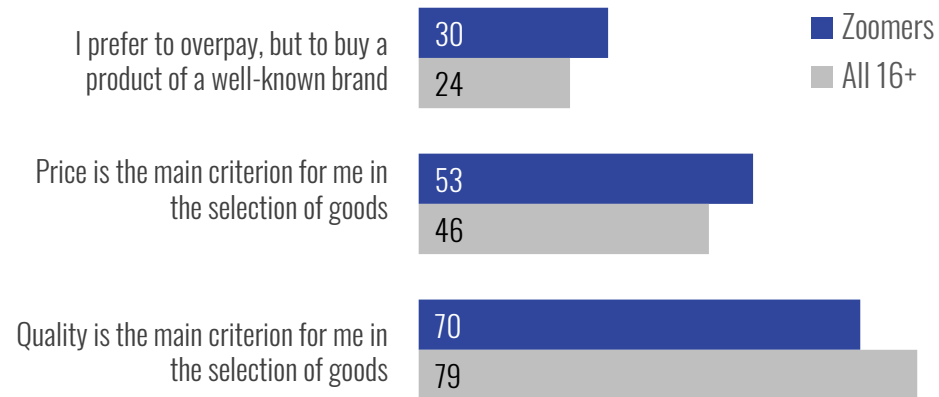
Source: Ipsos. [RusIndex](#). 2022/Q2

The number of
own-brand products
increased by

30%

in the purchases of
SberMarket customers

Shopping attitudes (%)



SIGNALS



- «Magnit» introduced more than 300 own-brand items into its assortment. [>>](#)
- In 2021, Ozon launched its own food brand Ozon Fresh, and in 2022 it announced the own brand of clothing. [>>](#)
- X5 releases communication aimed at own brands with the involvement of top bloggers. [>>](#)

A THOUSAND AND ONE REASONS TO LOVE RESALE

The interest in secondhand goods is growing. The inaccessibility of favorite foreign brands is not the only reason why customers are increasingly paying attention to resale. Many are thinking about social responsibility and want to reuse goods to reduce environment load. This idea is more popular among zoomers (23%) than among the general population (17%). In this regard, some resale platforms focus specifically on young people, although the idea of reuse in general is actively pursued by various brands both abroad and in Russia.

Buy second-hand things to reduce environment load

23%
of zoomers

17% among 16+ generally

Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

Number of "second hand" requests

in Yandex increased by

17%

in the interval for the first half of 2022 compared to the same period of 2021

<https://wordstat.yandex.ru/>

SIGNALS



- SOKOLOV Jewelry Company launched a jewelry exchange service. [>>](#)
- Depop, a fashion resale resource focused on zoomers, has been launched. [>>](#)
- Russian resale platforms are seeing a multiple increase in popularity. [>>](#)

4FUTURES RETAIL



Foresight scenarios we
may see in ten years

An artifact from
the future

GROWTH



TRANSFORMATION



CONSTRAINT



COLLAPSE



RETAIL. "4FUTURES" FORECASTS



GROWTH

LARGE BULK GOOD BULK

A further increase in the need to buy more cheaply leads to an increase in wholesale sales and the emergence of so-called "household exchanges," which allow you to order food and household goods in large quantities from sellers (retailers or manufacturers).

Big data from loyalty programs makes it possible to estimate the volume of products and non-food items needed for the buyer for a long time (for example, six months or a year) and purchase them at once in the required volume at a more comfortable price. The buyer can store bulk purchases at home (in the country house, garage) or can purchase a storage service at the seller's site for a separate service fee.

The resulting surplus can always be put up for sale through the same exchange.

CONSTRAINT

SECOND HAND TO BE DIFFERENT

The breakdown of supply chains and the departure of familiar manufacturers has led to a shortage of dyes in production. White packaging on the shelves, gray printing paper, and clothing in a limited set of monochrome colors are becoming a common reality.

In clothing, secondhand has become the only way to stand out among the general monochrome. High-quality "things from the past" that can be resold many times and passed on as heirlooms are valued most of all. "Flea markets" are acquiring premium status and becoming part of large retail chains.

Another opportunity to stand out from the crowd and show your originality are meta universes, where there are no restrictions on colors and originality of design.

TRANSFORMATION

NO BOUNDARIES MARKETPLACES

Giant marketplaces are developing their offline networks, which are becoming impression points and consultation centers.

Because of another crisis empty huge malls are being revived as part of the offline component of marketplaces. On their basis demonstration and educational centers are being developed for the use of new technologies in shopping, such as smart home appliances capable of self-ordering goods; clothes with the function of reordering exact copies as the current item falls into disrepair; real-time shopping for things from movies and video games, etc. Visitors actively use workshops and consultations by helping practitioners - nutritionists, specialists in style, design, home comfort, the use of robots in the home, etc.

COLLAPSE

THE "ENVY ECONOMY" IS DEAD

A new generation, raised on the importance of social responsibility and mental balance, does not accept the values of the previous century the "envy economy" and overconsumption. Choice in stores is increasingly standardized in order to reduce the output of unnecessary goods, saving nature, and minimize shopping time to save it for communication, development and creativity instead. A limited set of own brands is gradually supplanting independent brands. The retail chains that are closest to the consumer determine the optimal assortment. Large manufacturers unite in clusters to optimize production costs.

For a narrow circle of fans of shopping for fun, it has remained in computer games or in special centers, geographically localized, like casinos, because shopping for fun is no longer socially approved.

RETAIL. ARTIFACT FROM THE FUTURE



FROM GAME TO REALITY

Vitaly was very tired after a hard day and his favorite comfortable sneakers were torn on the way home. And they were so dear to his heart! These were the sneakers Vitaly wore in his first amateur cross-country race. They reminded him that he could overcome not only that distance but also himself.

To cheer up a little, Vitaly turned on his favorite virtual game. Wow, there's a new outfit in the game – superhero sneakers! He immediately wanted these for his avatar.

After a couple of hours in the game, Vitaly took off his virtual helmet very pleased – in the computer space, the superhero's sneakers made him incredibly light and fast, giving him an advantage of speed and agility over other players.

"Would you like to buy one of these for you?" the question appeared on the screen. Of course! Vitaly had heard about this new "thing" from friends, but had not yet had a chance to try it himself. He chose a size, spent a couple of minutes in the virtual dressing room, paid for his order, and chose a convenient delivery type.

The next morning Vitaly was walking down the street in his new superhero sneakers. Suddenly he wanted to sign up for a new run in the mountains - he needed to test the new shoes in reality. Done! I'm sure they will bring good luck and new victories.

COMMUNICATIONS

The crisis challenges algorithms



Robots are getting used, but it is not yet trusted

Robot calls are being dropped less frequently, but there is still a need for human presence in sales and service. After the lifting of restrictions related to the COVID-19 pandemic, the willingness to interact with real people in sales and service is again noticeable.

Metaverses – desirable, but far away

Almost every third zoomer already trusts the metaverse. But the experience of the first users shows that something can be improved. Startups are looking for solutions for the convergence of sensations, but users are in no hurry to buy VR headsets.

Less worry about personal data using

Zoomers are ready to share data for the sake of personalization.

Advertising tells people that the brand is still on the market

Zoomers need advertising to orient themselves in brands remaining in Russia.

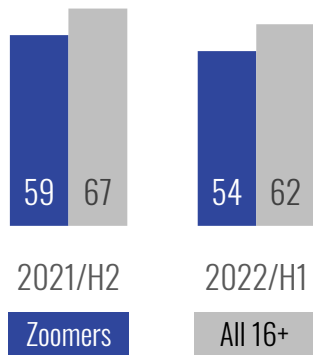


ROBOTS ARE GETTING USED, BUT IT IS NOT YET TRUSTED

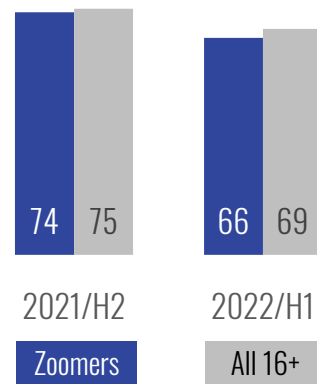
The six months that have passed since OnLife's previous measurement have had a positive effect on the reputation of phone robots - the share of those who hang up when they barely recognize a robotic voice has decreased by 5pp equally among the more technology-friendly zoomers and among the general population. At the same time, the need to switch from chatting with a bot to chatting with a real person at any moment has significantly decreased. Nevertheless, 66% of zoomers and 69% of the 16+ population as a whole would still like to have the backup option of requesting help from an employee. It means that it is still a long way to full confidence to the algorithms.

During the same short period, the perceived convenience of contactless technology solutions in sales and service also declined. Data collection Online 2022/H1 was in the second half of March 2022, when a new crisis has already affected many technological and routine business processes. Therefore, the data may indicate both that emerging technology disruptions have made the use of technology solutions less stable and convenient, and that after the lifting of restrictions related to the COVID-19 pandemic, people are again ready to interact with cashiers and other representatives of the company without fear.

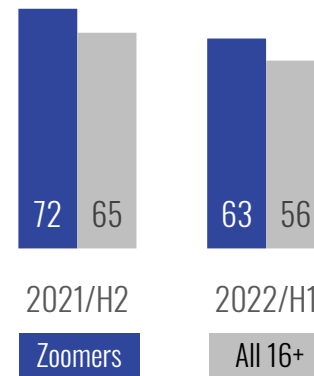
I immediately hang up,
when I hear that a robot is calling me on
the phone (%)



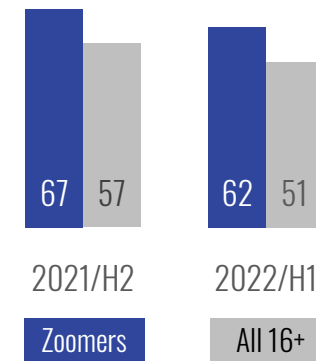
**I should be able to request a real employee to
connect to the conversation at any time,**
if a company uses bots to resolve customer
requests(%)



**It is convenient for me to place orders
through the forms on the website or in the
application, without contacting company
representatives directly (%)**



**It is convenient for me to use terminals or
special digital counters, self-checkout counters,
etc., in order to minimize contact with cashiers
and company employees (%)**





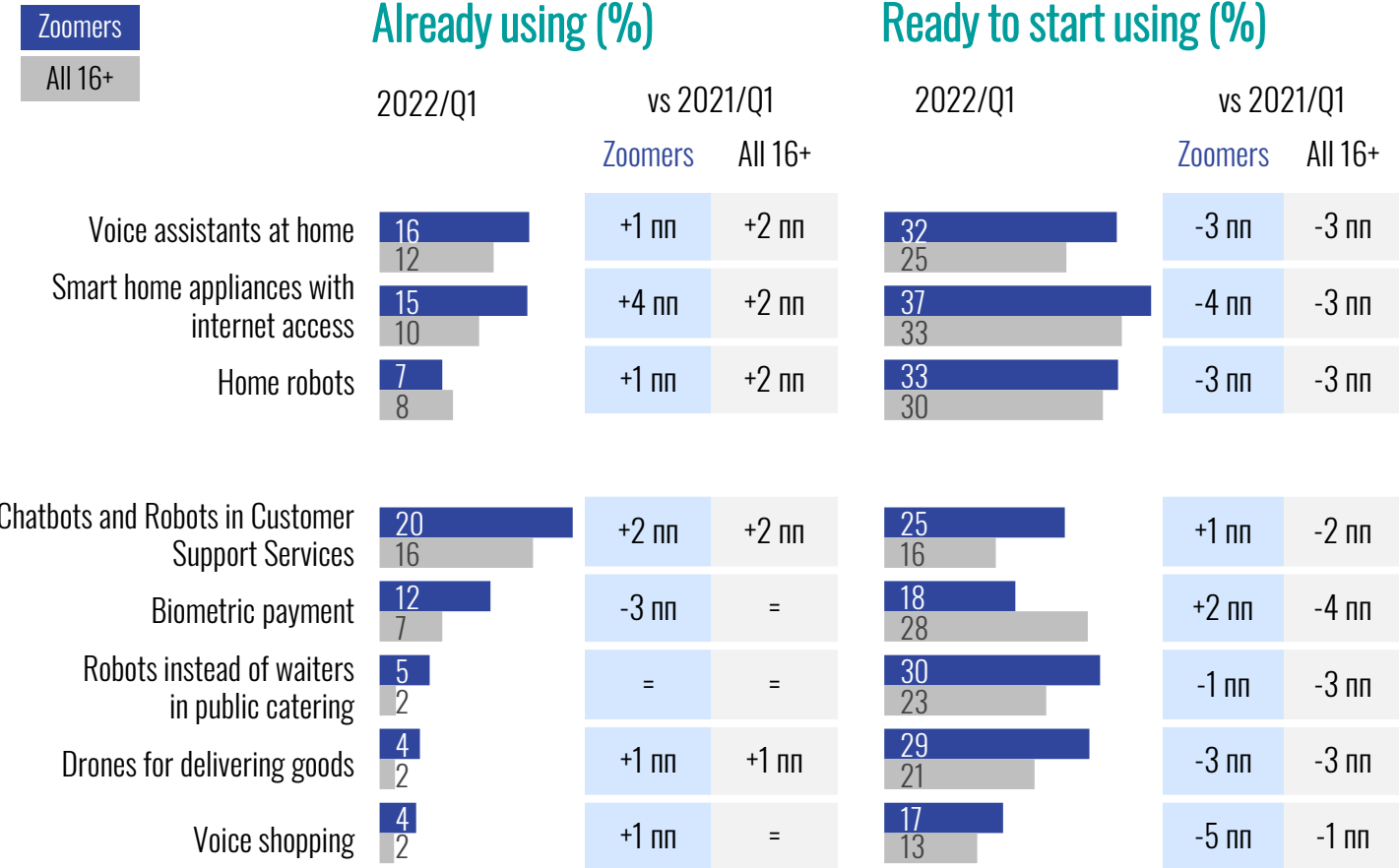
CRISIS AGENDA COOLS INNOVATION ADOPTION

One year after the previous measurement, zoomers are still more active in adopting innovations. Chatbots and support robots, voice home assistants, and smart home appliances are leading in usage, showing an increase of 4pp precisely on zoomer audience by the most notable 4pp. At the same time, biometrics, which is also more actively used by zoomers, has lost 3pp of young users over the year. Although there is no negative dynamics in the willingness to use it – unlike the general population, their willingness to use this service decreased by 4pp with unchanged use over the year.

At the same time, there is a negative dynamics of readiness to use all innovation options among the Russians 16+ and almost all innovation options among zoomers, except chatbots /support robots and biometric payment.

Using and willingness to use innovation

Changes for the year



METAVERSES – DESIRABLE, BUT FAR AWAY

So far only a few people have real experience with meta-universes, and often, according to the reviews of pioneers, usability still needs to be greatly improved. But according to Ipsos, 15% of the general population and 29% among zoomers trust metaverses. Developments in the direction of virtual reality are now focused on the convergence of sensory organs, when a person will be able to smell, touch and experience a complete transfer to digital worlds. According to analysts, [the global market for AR and VR headsets has almost doubled in 2021](#). But it's too early to talk about mass participation.

If we consider metaverses as analogs of digital worlds, we can rely on interest in computer games as a guide – according to Ipsos, one in two Russians 16+ play PC games. Among the zoomers, the figure is significantly higher, at 57%. Life simulators – exactly what metaverses strive for – are the most popular type of games among zoomers. The potential is really great. But if the goal is to fully immerse yourself in digital worlds with the help of VR, now we are very far away, at the moment the ownership of VR glasses does not exceed 5% in families with zoomers. Only 3% of [RusIndex](#) study participants reported plans to buy this (2022/Q1). It means that we still have a long way to go to mass use of metaverses.

Trust in metaverses(%)

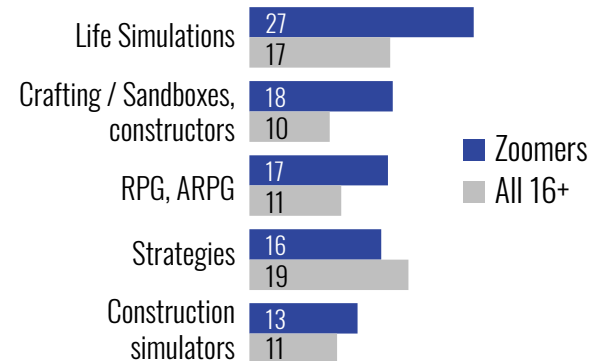
29%
zoomers

15% among Russians 16+

Source: Ipsos, [RusIndex](#), 2022/Q1
Russians 16+, cities with population of 100,000

57%
zoomers

Played
on a PC



Source: Ipsos, [OnLife](#), 2022/H1
Russians 16+, cities with a population of 100,000+, active internet users

Have VR-glasses or plan
to buy it (%)

4,6%
Have at home

Families
with zoomers

3%
Plan to buy it (%)

Families
with zoomers

SIGNALS



- Startup OVR Tech is working on the transmission of smells in virtual reality. >>
- The first wedding in the metaverse was held in Russia. >>
- Pixel Earth, NFT, virtual Economy – review of celebrity and brand promotion cases in the metaverse. >>



LESS WORRY ABOUT PERSONAL DATA USING

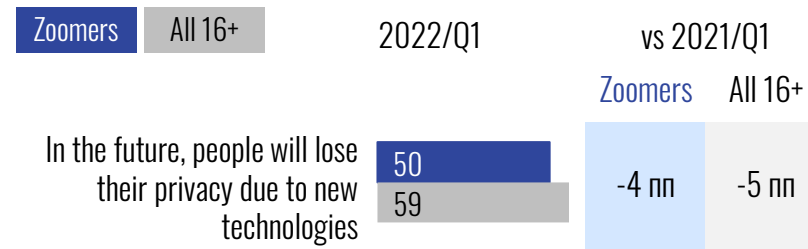
In contrast to Russians in general, the share of zoomers who are willing to share personal information about themselves with companies in exchange for personalized products or services, has increased by 4pp over the year.

But the opportunity to receive payment for providing personal information has become less attractive for zoomers, as well as for the general population.

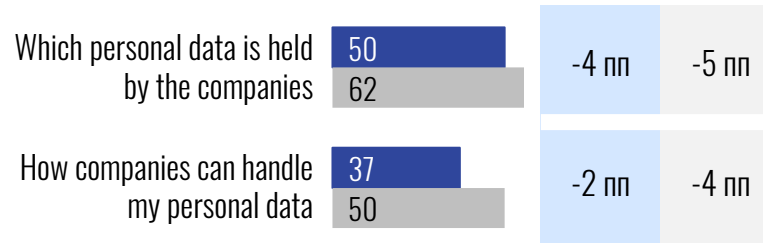
The concern of users about the use of personal data by companies is reduced.

Also, the data in dynamics show that people are less and less afraid of losing privacy due to new technologies.

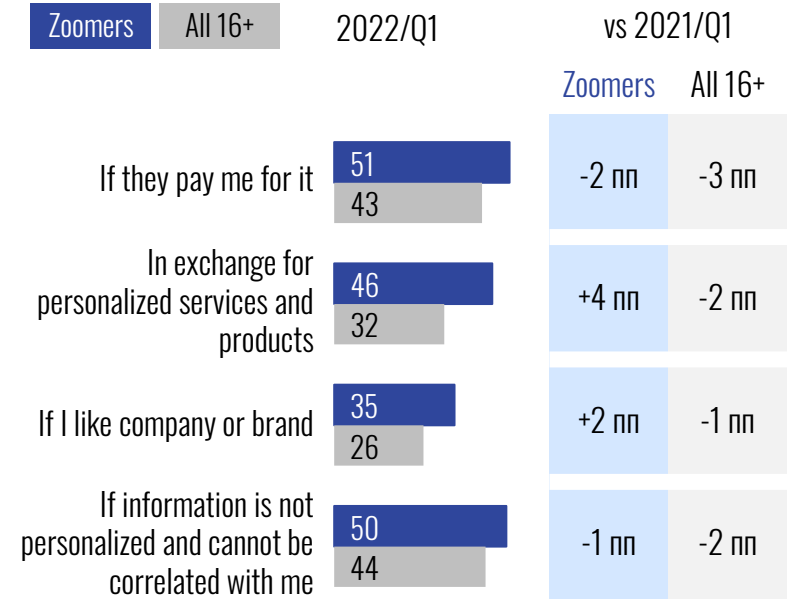
Attitude towards providing personal information online (%)



Consumers don't know... (%)



I am ready to provide information about myself to companies... (%)



Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000



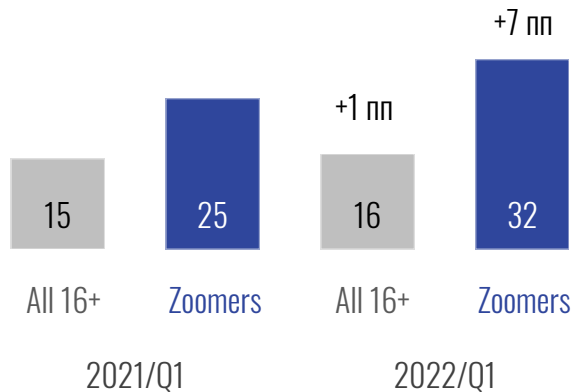


ADVERTISING HINT YOU IF THE BRAND IS STILL ON THE MARKET

Zoomers, unlike other generations, are less inclined to believe that pay attention to ads mean to waste time and they are more focused on advertising when buying goods. In the first quarter of 2022, the use of advertising as a reference point during the purchase increased by 7pp compared to last year. It can be assumed that such a sharp increase occurred due to the withdrawal of many foreign brands from the Russian market, as zoomers are active buyers of foreign goods. Advertising helps young people to update their knowledge about the brands remaining on the market. Interestingly, the proportion of those who focus on advertising in general among Russians 16+ has not changed.

At the same time, the share of zoomers who disable advertising in their online space whenever possible is also slowly growing (+2 pp to 17%).

“I prefer to buy goods I saw advertised” (%)



Source: Ipsos. [RusIndex](#).
Russians 16+, cities with population of 100,000

To pay attention to advertising means to waste time

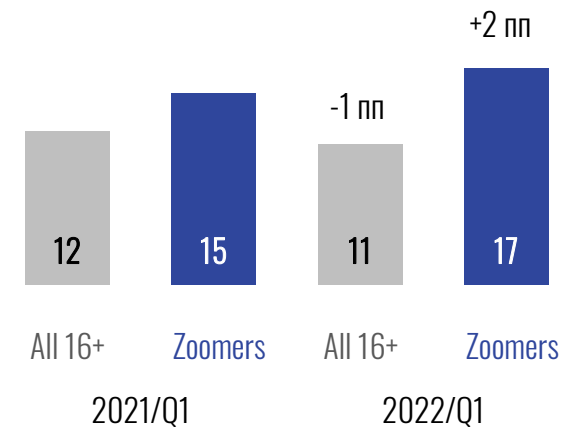
46% zoomers

52% among Russians 16+

Agreeing with the statement.
Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

Don't see ads (%)

(Disabled pictures, pop-ups)



Source: Ipsos. [RusIndex](#). 2022/Q1
Russians 16+, cities with population of 100,000

4FUTURES COMMUNICATIONS



Foresight scenarios
that we can see on the
horizon in ten years

An artifact from
the future

GROWTH



TRANSFORMATION



CONSTRAINT



COLLAPSE



COMMUNICATIONS. "4FUTURES" FORECASTS



GROWTH

NEURAL NETWORKS GENERATE ADS

Not only the generation of images, but also the automatic generation of commercials is now available in real time because of development and improvement of neural networks. The visual range of the video is formed on the basis of socio-demographic characteristics and depending on the mood and psychological state of the user.

If a user has provided a brand with access to their own videos, images or other data in their gadgets – for a sale or a gift from the brand – the neural network generates advertising based on the user's own content, thereby providing closer contact and a stronger emotional response to advertising.

If a user liked an ad and shared it on social networks or metaverses, brands also earn bonus points in the loyalty program.

TRANSFORMATION

CONSUMER IS AVAILABLE BY SUBSCRIPTION

The embedding of chips into the human body since birth has been actively promoted. New generation smart devices (laptops, smartphones, home appliances, etc.) interact with this chip when they are first turned on, adapting the technical characteristics and content to the physical and mental parameters of the owner (hearing, vision, temperament, psychotype, etc.).

People are grouped into recommended communities based on their interests and physiological capabilities, based on the data accumulated on the implanted chips.

This information also makes it easier for brands to target their ads. So brands buy monthly subscription access from users to the information on the chips and the right to stream ads to the consumer's connected devices. The fee may be different depending on the amount of information to which access is opened.

CONSTRAINT

SUSTAINABILITY OFFLINE AND ONLINE

The greenhouse effect is enhanced by the large-scale use of data centers, harming the environment. Regions are introducing quotas for total carbon dioxide emissions.

Digital companies are responding to this. Firstly, they are stepping up the fight for information ecology by introducing fees for active content generation and commenting online. Users (individuals and organizations) can now leave only a minimal amount of information online for free. An active digital presence costs extra money. Secondly, "greenhouse symbioses" are developing - businesses enter into collaborations for optimal sharing of data center resources and cooperate with startups that use carbon dioxide as a raw material for production.

COLLAPSE

BRANDED SILENCE

Despite the fact that Internet access is already considered a basic human right, total connectivity provokes information overload and poses a threat to mental health due to the high toxicity and aggressiveness of online communication.

Observing people's need for digital detox, brands create islands of "mental safety" - special branded areas in urban environments or public spaces, where Internet access, mobile communications and the operation of any gadgets are technically blocked on a permanent basis or for certain fixed hours.

Such places are popular because it gives the opportunity to relax, enjoy the silence and arrange a short-term mental discharge.

COMMUNICATIONS. ARTIFACT FROM THE FUTURE



DEEPAKES IMPROVE THE EXPERIENCE

Denis loves Korean series. He came home and started a new season of his favorite drama.

The movie credits did not have time to start, as an advertisement appeared on the screen. The transfer of the mask of any character in the series to any face was offered to Denis.

What progress has come to. You can legally use deepfakes! Of course, it's interesting to test it. The price for the deepfake of the main character is the highest, the secondary characters cost less. It's a bit expensive, but if you really want, you can do it! Where could this be used?

Denis remembered that he needed to watch a recording of a lecture for an offline seminar at the university by tomorrow. There is a terrible boredom. The series, of course, is more interesting, but learning is more important.

Here it is, Eureka! Of course! A couple of minutes and payment is made. Let's try it on a cheaper character. And now a cute character from a Korean TV series is giving a mandatory educational lecture.

It's a cool idea: a digital simulator has ideally replaced a teacher with a movie star. "A" in the seminar is guaranteed. I wonder if any of my classmates have thought of this. If not, I have to be sure to tell them.



MAP OF TRENDS



Zoomers. Born for adaptation

SOCIAL PROFILE

- Family does not mean children
- Share of zoomers combining work & study decline
- Zoomers pass crises with a higher degree of comfort comparing to seniors

Forced readjustment

LEISURE & ENTERTAINMENT ONLINE

- Movies and videos online. Betting on short formats
- Music is the main driver of page visits and purchases for online zoomers
- Entertainment opportunities have decreased
- Korea in the Runet mirror

Contradictions on a plate

FOOD TRENDS

- Diets as a way of life
- Fast food does not interfere with healthy lifestyle
- Remote work affects nutrition
- If tea, then with additives
- Innovations in nutrition. Intentions do not translate into consumption

Be yourself and enjoy life

VALUES

- The value of the family is falling, and the value of relationships and enjoyment of life is growing
- Appearance as a social position
- Mental health is important for zoomers, especially for girls

In search of a meaning

TRENDS IN EDUCATION

- Work-Life-Study Balance matters
- To college instead of university
- Bootcamps. Digital professions for six months

Technologies, emotions and awareness

RETAIL TRENDS

- Online-natives and offline-tourists
- Subscription purchases. High potential at high distrust
- Zoomers love foreign brands but are deprived of the opportunity to buy them
- A thousand and one reasons to love resale

Eco-friendly, but comfortable

ENVIRONMENT

- Digital transformation moving zoomers away from nature
- Zoomers are worried they would have to sacrifice their comfort for protecting the environment
- Zoomers are more willing to pay for eco-friendliness

Earning with pleasure

TRENDS IN FINANCE

- Money is an important indicator of success for zoomers
- Prefer remote work, look for work in social media
- The crisis of 2022 cools interest in creative professions
- Zoomers invest bolder but entrepreneurial confidence is declined

Crisis challenges algorithms

TRENDS IN COMMUNICATIONS

- Robots are getting used, but it is not yet trusted
- Metaverses – desirable, but far away
- Less worry about personal data using
- Ad tells people that the brand is still on the market



CONCLUSION. HOLD THE LEVEL



In previous crises, we saw that emerging restrictions stimulated the introduction of innovations and new technologies – this is how the Internet, e-commerce, and contactless shopping grew exponentially.

Now, in 2022, we are seeing evidence of the reverse. Just a year ago, the coronavirus pandemic spurred the spread of contactless shopping, delivery, robots and chatbots. Businesses, employees and consumers have adapted to new technological solutions. Much has been said about the importance of maintaining the quality of service, and the market leaders managed to keep the bar high.

2022 has made its own adjustments – consumers have experienced technological limitations and failures in the operation of the already familiar payment counters without a cashier, NFC payment, banking applications, etc.

There is a new adaptation period – it is important to maintain the efficiency of solutions that consumers love. It is important to keep the high level of customer experience quality.

In this regard, we also look at future scenarios. There are no good or bad scenarios in the foresight technique. There is the ability to see different trajectories from different angles, such as continued growth, constraint, collapse, and complete transformation. We offer you different scenarios how things can change on the horizon of 5-10 years. We'll be happy to discuss this our vision. Together we will see more perspectives.

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