

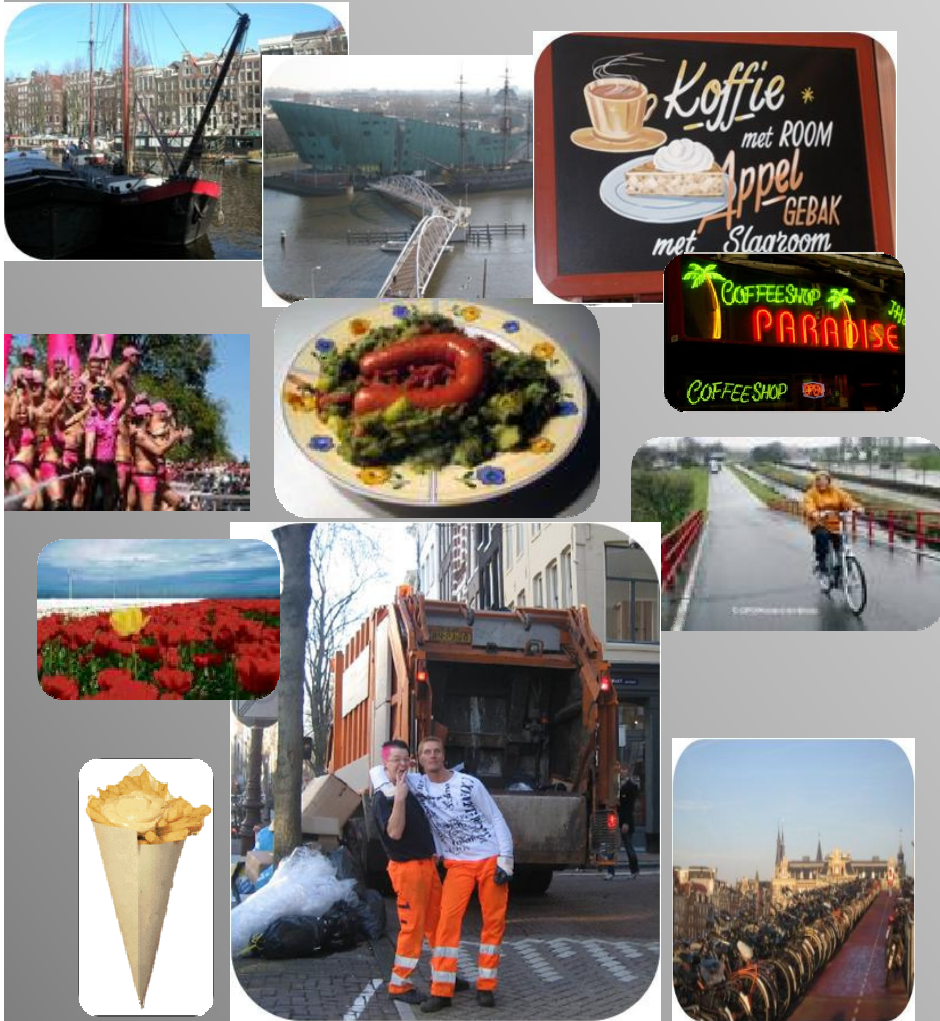
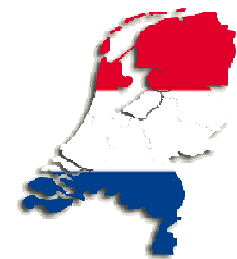
# Synovate Hotspots

## The Netherlands



# life to life

## Bringing The Netherlands to life



# Bringing the Dutch life to life

- This document is designed to give you an overview of the Netherlands, its people and some of the key issues and trends Synovate is observing in the country today.
- The core source of information is ‘LifeWorlds’ (Synovate’s ethnographic approach), but it is complemented with Synovate’s broader understanding of this country’s culture.
- Following a brief introduction, our discussion has two main parts:
  - “Big Ideas”: insights into Dutch culture and consumers
  - Implications for research

# The Netherlands is more than.....



## Some figures ....

- Total Population: 16,410,307
- Top 4 cities and populations:
  - Amsterdam: 739,104
  - Rotterdam: 596,068
  - The Hague: 468,421
  - Utrecht: 275,797
- Ethnic mix:
  - 3 million people with foreign nationalities (18%), 1.7 million non-Western nationalities (10%) and 1.4 million Western nationalities (8%)
  - Non-Western nationality subdivided in 4 biggest groups
    - 21% - 370,000 Turkish nationality
    - 19% - 330,000 Moroccan nationality
    - 19.5% - 333,000 Surinamese nationality
    - 7.5% - 130,000 Antillean nationality
- Age profile:
  - 24% under 20
  - 26% 20 - 40
  - 35% 40 - 65
  - 14% 65+
- Average household income
  - National: 20,000 EUR per year

## Top 10 brands

1. Campina (dairy products)
2. Marlboro (cigarettes)
3. Douwe Egberts (coffee)
4. Heineken (beer)
5. Unox (food)
6. Friesche Vlag (dairy products)
7. Coca-Cola (soft drinks)
8. Becel (food)
9. Danone (dairy products)
10. Amstel (beer)



Source: <http://www.marketing-online.nl/nieuws/moduleitem53682.html>

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# **Section I: Big Ideas**

# Bringing the Netherlands to life: “Big Ideas” Insights into Dutch culture and consumers

- Calvinist Roots Run Deep: Calvinism continues to influence modern Dutch society, with an emphasis on modesty, thrift, and personal reserve.
- Cutting Loose: Dutch people can appear to be sombre hard workers but in fact they are capable of tremendous exuberance and jealously guard their leisure time
- Progressive and Proud: the Netherlands is a famously liberal society – and the Dutch are fiercely proud of their country and its values.
- Perfect Health in the Perfect Body: the traditionally functional Dutch approach to food and health is being challenged by the global desire for physical perfection and a health-oriented philosophy to eating
- A New Generation with New Values?: Thanks to the influence of global popular culture, Dutch youth are more outspoken and worldly than their elders



# Bringing the Netherlands to life: “Big Ideas”

Calvinist Roots Run Deep Calvinism continues to influence modern Dutch society, with an emphasis on modesty, thrift, and personal reserve.

## Insights into Dutch culture and consumers

- Cutting Loose
- Progressive and Proud
- Perfect Health in the Perfect Body
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# Big Idea: 'Calvinism' and Dutch culture

- The Dutch culture is historically based on Calvinistic principles. These are the strongest in the countryside of the Netherlands. This has implications for everyday life...
  - Don't show off** your success, status or money
  - The Dutch tend to live **modestly** and are level-headed
  - Are **thrifty** and have a **reserved attitude**
  - They are not used to expressing their emotions in public
  - Income is not a subject of conversation
  - Welfare state: the government has a big influence on our norms and values. This is i.e. expressed in advice on healthy eating
  - Don't spend money if you haven't got any (use of credit card is not very common in everyday life)
  - A lot of **rituals** (e.g. dinnertime is set, drinking coffee at set times), less impulsive behavior
  - The Calvinistic (normative) nature also comes up when women go back to work (part-time):
    - Women feeling guilty about working part-time instead of full-time, as they think they need to work more to do their job even better.
    - Women feeling guilty towards their child(ren) about working (even if they are working part-time) and thus about not being able to spend a lot of time with them.



# Calvinist culture: Understatement is the norm

- The way the Dutch spend their time and money is generally based on the need **not to stand out in the crowd**. This has implications for everyday life...
  - Eating and drinking: typically Dutch food is **basic and functional** (focused on filling the stomach).
    - Breakfast and lunch are usually home-made sandwiches 'on-the- go'.
    - Going out for dinner: not too fancy, at pubs serving meals, and often for a reason (e.g. birthday, wedding anniversary).
    - However, international cuisine has made an entry into the Dutch kitchen and has become a common choice for going out to dinner.
    - Children seem to be big influencers of the choice of the food.
  - Going out is going to bars, pubs and discos, mainly during the weekend. Starting from age 25, going out becomes less frequent and evenings are often more culturally focused (theatre, cinema).
  - Visiting friends is a common way to spend some time in the evening or the day;
  - Appearance & looks; the Dutch don't spend too much time and effort on dressing up for occasions.



# The Netherlands: An orderly society

- **Clarity and organization** is extremely important to the Dutch. In case you don't know where to go, just look around you and a signpost will tell you!
- The Dutch want things to be well **arranged** and well **structured**.
- And the people? They schedule almost every daily event in their calendars. Their days are well-structured, the Dutch are very **punctual**. Don't be late! Nine o'clock means 9.00, not 9.15!!



• And have a look at this huge parking for bicycles:



# Bringing the Netherlands to life: “Big Ideas”

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# Cutting loose: Exuberant and expressive side to Dutch culture

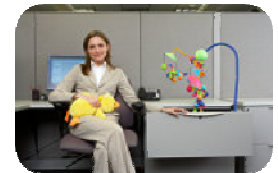
- Even for people known as cold and down-to-earth, the Dutch can go quite **ecstatic** and high-spirited. Have you seen our madness that springs from us when a fellow countryman or -woman wins an important sports match or tournament like the national football team, Pieter van den Hoogenband (swimming), Raymond van Barneveld (darts), the Dutch volleyball team: people go crazy. What does crazy mean? Well, have a look at these pictures:
- When a member of the Royal Family gets married or has a baby, lots of people feel like going out to **celebrate** with each other. The summit of this is Queen's Day, when thousands of people dress in orange and go out. As you see, the Dutch can be very high-spirited.
- Of course we all know famous artists like Van Gogh and Rembrandt; nowadays lots of people seem to express their **artistic creativity** in public.





# The importance of leisure

- **Time spent; working vs. leisure...**
  - The Dutch are **hard, efficient workers** and want to earn an honest and fair living, but also value their leisure time: relatively short but highly productive working weeks.
  - A lot of part-time workers (often mothers), as working part-time is a legal right in The Netherlands.
  - Going on a holiday (abroad) is important, a claimed right (three weeks in summer).
  - Next to the summer holiday, most people also go on a shorter holiday in spring (e.g. winter sports in Austria, France or Switzerland), or on city trips during the year.
  - Children have a major influence on choosing a holiday destination.



# Cultural: “Gezellig”

The little word **gezellig** (cosy, pleasant, sociable) is very popular word and describes the social and enjoyable situation of the Dutch being together. Drinking coffee together in a bar or at home with some friends, having dinner with the whole family...

Even at work...





# Bringing the Netherlands to life: “Big Ideas”

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- Progressive and Proud: the Netherlands is a famously liberal society – and the Dutch are fiercely proud of their country and its values.
- Perfect Health in the Perfect Body
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# Big Idea: Progressive and proud

- The Dutch are very **proud** of being Dutch and of their identity. They like talking about their country, their traditions, their language, their habits et cetera. They have a very rich history as navigators, merchants, explorers, and farmers. Much of the beauty of the country is a heritage of all this.
- **Progressiveness and tolerance** are characteristic aspects of Dutch culture and most Dutch people. Things which some countries look at with anxiety are completely integrated in The Netherlands. We feel special because of this. A few well-known examples are the way soft drugs (marihuana) are tolerated, and the way the Dutch deal with gay marriage and euthanasia.
- The Dutch are fiercely egalitarian in their values and **don't accept hierarchy**. They will always discuss a statement even if it is from someone who holds a higher position; things are not easily accepted.



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# Big Idea: Perfect health, perfect body

**The Dutch are not immune to world-wide trends like the emphasis on physical perfection and health. Yet even this trend has taken on some typically Dutch characteristics**

- **Perfection/ normative health:** try to be as perfect from the outside as possible, then you will look healthy. ‘The lower your weight the healthier you are’ seems to be the current norm.
  - The latest publication by diet guru Sonja Bakker, ‘Gaining and keeping your ideal weight’, was one of the books with the highest sales rates in 2007. Bakker offers practical help with diet recipes, including a (branded) shopping list for several weeks. Some brands saw their figures rise because they were mentioned in the book.
  - Plastic surgery is becoming more and more common.
  - TV shows like ‘Make me beautiful’, ‘The slimmers XXL’ (De Afvallers XXL) are popular.
  - Living healthy is made easier by means of several logos on the packagings:
    - “Kies Bewust” logo (‘Choose sensibly’ logo), Klavertje Vier (AH sensible choice logo)



# Growing emphasis on health

- **Convenience needs to be healthy**

As convenience has been a trend since a long time already, a shift towards more healthy, luxurious, quality products is clearly visible.

- **On-the-go:** healthy, higher quality snacks are more available than before, even complete shops open for this purpose, with healthy sandwiches, prepared fruit, juices, etc. ('AH to go', 'Wok to go').
- **At home:**
  - Increasingly more high-quality and healthy food for easy preparation (microwave oven) is becoming available.
  - More luxurious food products are easily accessible and sometimes they are ready-to-eat (AH Excellent (full supermarket high-end private label), Jamie Oliver food line).



"Cooking with Chefs"



# Perfect body image tempered by Dutch realism and nostalgia

## Typically Dutch takes on the global question of body image:

- **Accepting your imperfections:** The craving for perfection has a counterpart in accepting your imperfections. This counter reaction seems to originate from the Calvinist character of the Dutch (“act normal, that’s enough”).
  - Dove’s TV commercial with “normal women” is very well-known and much appreciated.
  - Instead of dieting, one promotes the ‘Balansdag’ (‘Balance day’); the day after you have eaten too much, you just eat extra healthy.
  - TV shows: “Say no to the knife”: no plastic surgery, just tips.
- **Nostalgia:** Back to authentic Dutch culture.
  - TV dating show: “Boer zoekt vrouw” (‘Farmer seeking Wife’) is extremely popular (25% of the Dutch watch this program), because of its fine combination of the characteristics of Dutch culture (down-to-earth, accessible for all), combined with real emotions (no script, show the real thing). Next to this, it shows the agricultural culture in a very romantic way.
  - There seems to be a greater interest in truly Dutch food products. More biological and regional products are being sold. Dutch top chefs are promoting them also.



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# Big Idea: New generation, new values?

- **Early maturity:** Youngsters increasingly show mature behaviour at a younger age:
  - Sex, drugs and rock & roll (hip-hop) is booming
    - Sexual attitude in music videos
    - Explicit sexual education on the internet ([www.hoehetmoet.nl](http://www.hoehetmoet.nl)) (“how to do it”) and TV “Spuiten en slikken” (very progressive explicit educational program about sex and drugs)
  - This mature attitude is criticised by a counter trend:
    - Forum on the TMF/MTV website (discuss videos), shows like “I want a Famous Face”, which also shows the downside of plastic surgery.
    - TV show: ‘40 days without sex’ by the EO (Evangelical broadcasting company)
- **Street language:** The use of street language by the youngsters:
  - Integration with other cultures: combining Dutch with words from Aruba, Morocco, ... but also the MSN language.
    - National Street Dictation on TV as counterpart of the National Dictation of the Dutch language.
- **Expose your life:** Exposing one’s private life in public:
  - YouTube
  - Web logs, Hyves, MySpace, Flickr







## **Section II: Implications for research**

# Implications for qualitative research in the Netherlands

1. Although Holland is a small country, there is an major difference in attitudes in the western part of The Netherlands (“de Randstad”), and the rest of The Netherlands. In “de Randstad” people have a more open-minded and outgoing attitude. This attitude helps to get true input on new products or innovations. People in the rest of the Netherlands can be more conservative.
2. Men are an upcoming group for household products, but overall the household is still quite traditionally divided.
3. Children have a relatively important influence on purchase decisions and can therefore be treated as a target group in their own right.
4. Religion is not a disturbing factor in fieldwork.
5. When creating a comfortable atmosphere in a research environment, one should at least keep in mind the Dutch way of cosiness.

## Implications for qualitative research in the Netherlands - timings

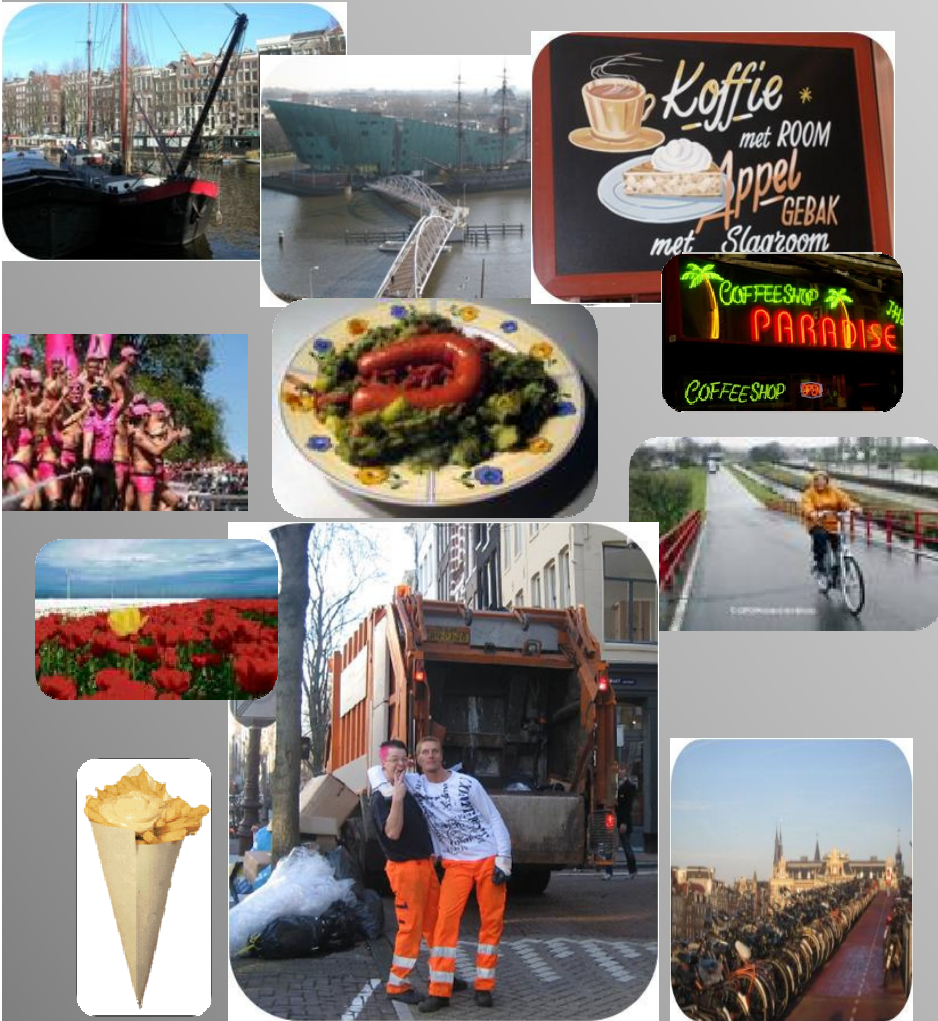
1. Don't plan fieldwork on Friday afternoon, as most people start their weekend then. People are not willing to attend fieldwork at weekends.
2. As most people have dinner between 18.00 and 19.00, it is important to plan fieldwork before or after.
3. Children aged 4 to 12 have the Wednesday afternoon off. This makes it difficult to speak to mothers on a Wednesday afternoon.
4. Fieldwork can be planned back-to-back, as it is perceived as normal to start right on time.

# Launching products in the Netherlands

There is a greater opportunity for new products in The Netherlands if they ...

- Are not too much focused on showing off.
- Touch one of the trends discussed in this presentation (e.g. health, convenience, nostalgia, youth culture).
- Are communicated in a direct way (e.g. not too polite, which risks coming off as suspicious / pretentious).
- Are launched via a buzz created on the Internet (products for youngsters) → viral marketing.
- Are NOT executed in orange, as this is perceived to be a seasonal product (special Queen's day, or football edition).

# Bringing life to life



Thank you