

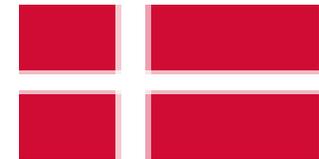
Synovate Hotspots Denmark



lifeto life



Bringing Denmark to life





Bringing Denmark to life

"If you are interested in horrible places, I can recommend Denmark. No one starves. Everyone lives in small, pretty houses. But no one is rich, no one has a chance to a life in luxury, and everyone is depressed. Everyone lives in their small well-organized cells with their Danish furniture and their lovely lamps, without which they would go mad"

V.S. Naipaul. Author, Nobel Prize winner

In this document, we are out to see if V.S. Naipaul is right or if there is indeed more to Denmark than spiritless luxury...



Bringing Denmark to life

- This document is designed to give you an overview of Denmark, its people and some of the key issues and trends Synovate is observing.
- The core source of information is ‘LifeWorlds’ (Synovate’s ethnographic approach) supplemented by Synovate’s broader understanding of this country’s culture.
- Our discussion has two main parts:
 - “Big Ideas”: insights into Danish culture and consumers
 - Implications for research

Denmark – Wealthy lilliput



Denmark

Is a small country in northern Europe. Made up of a peninsula and 405 islands, Denmark's only shared border is with Germany.

Total Population: 5,470,000

Area: 43,000 sq. km.

Language: Danish

Average personal income

- 251.000 DKK (33,135 EUR)

BNP

- 1.637 billion DKK (216,6 billion EUR)

Ethnicity

- 81,3% Danish
- 8,7% immigrants and their descendants
- Large immigrant groups are Germans, Swedes, Turks, Iraqi, Somali, Pakistani

Religion

- 84,3% registered in national Lutheran-Protestant church
- 4% Muslim
- 11,7% Other

Top 4 cities and populations

- Copenhagen 1,700,000
- Aarhus 298,000
- Odense 158,000
- Aalborg 121,000

Top 10 brands



NOKIA
Connecting People

NETTO



LANCÔME
PARIS

IKEA®

- Coca Cola (Soft Drinks)
- Shell (Petrol)
- Audi (Cars)
- Nokia (Phone and Internet)
- Bang & Olufsen and Microsoft (TV, PC, video)
- Nike (Sports)
- Colgate (Personal hygiene)
- Lancôme (Cosmetics and perfume)
- Miele (Domestic appliances)
- Netto (Supermarkets)
- TV2 and Jyllandsposten (Media)
- Ikea (Retail)

The background is a solid teal color. On the left side, there are several abstract, overlapping shapes in a lighter shade of teal. These include a large, curved shape that resembles a stylized 'P' or a question mark, and a smaller circle below it. The text is positioned to the right of these shapes.

Section I: Big Ideas

Bringing Denmark to life: “Big Ideas”

Insights into Danish culture and consumers

- **A Nation of Napoleons:** A small but patriotic country, Denmark melds fierce national pride with a persistent inferiority complex.
- **Don't Say Please:** What might be seen as polite in other countries is frowned upon as superficial in Denmark a country where informality is prized and there is no word for “please”!
- **Strict Timekeeping:** Danes are not, however, relaxed about time – the busy, two-career Danish family is managing their life to a strict timetable.
- **Value and Price Focused:** Danish consumers are exceptionally focused on quality, functionality, durability – and price.
- **The Great Graying Dane:** Denmark's population is not only shrinking, it is aging – a trend that has many important implications for marketers.

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A nation of Napoleons: Small is great



National inferiority complex

- After losing 40% of the national territory to the Germans in the 1864-war, the Danes developed the notion that everything small is normatively great, and everything large is normatively bad.
- Paradoxically, this inferiority complex co-exists with a smug pride of all things Danish. As Danish poet Piet Hein put it:
“We Danes are best at everything. Even our inferiority complex is the largest in the world”.

Denmark and Goliath

- Denmark’s small size means that Danes can have low expectations – and rejoice mightily when they exceed these expectations!
- When Danes succeed internationally, there is no limit to our self-praise. Danes rejoiced for months after defeating Germany in the European Soccer Cup final in 1992.
- In the case of failure, the failure is instantly considered a matter of course.

Modest and Proud

- Danes prize modesty and their desire to be understated can battle with their national pride -- The slogan of internationally renowned Carlsberg beer is symptomatic of this: *“Carlsberg, probably the best beer in the world”.*

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Don't say please: Informality rules



The sign reads:

**Chocolate gives you
firmer breasts!**

Facts

- Danes pride themselves of being informal and relaxed in social contexts; in Denmark, informality rules.
- An illustrative example exists in the Danish language: Please, bitte and s'il vous plait have no equivalent in Danish.
- Also, Danes will rarely address anyone, even a distant business partner, junior or senior to him or herself, by anything but their first name.
- Many Danes feel puzzled, awkward or even slightly amused when confronted with more formal cultures, for instance when they are addressed by their family name etc.
- In some contexts, politeness is interpreted by Danes as a sign of superficiality.
- As this sign found outside a luxury chocolate shop in Copenhagen, testifies, Danish informality also indicates a very liberal-minded attitude towards the limits on public expression and marketing.

Implications

- On the surface, Danes may seem rude and even intolerant.
- Therefore, their utterings in e.g. focus groups may be misinterpreted as more harsh or critical than they were intended.



Informal culture: Hygge



Hygge is the aspiration in Denmark's relaxed society

- 'Hygge' is a fundamental value in Danish sociality.
- While 'hygge' has to do with both cosiness and relaxing, neither word captures the concept entirely.
- 'Hygge' is fundamentally a state of mind. It is about warmth, friendliness, and a sense of well-being; 'hygge' is a time when you are at peace with yourself and your friends, family or acquaintances.
- 'Hygge' is about creating an informal atmosphere, unwinding and relaxing. Conflict and different viewpoints are locked out for a while, because of the risk of spoiling the 'hygge'.
- Often, to 'hygge' means lighting candles and having plenty of food, snacks, wine, beer or coffee, whilst chatting informally, playing cards or just watching tv.

Implications

- If you can create an atmosphere close to hygge, you have come a long way in gaining the confidence and trust of the Danish consumer.

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Strict timekeeping: Efficient and on time



Facts

- In comparison with many other nations, the Danes are very strict on attendance times. Danes are not laid back when it comes to sticking to the schedule. To a Dane, efficiency has much to do with the clock; you are late if it's a quarter past.
- The notion *Stress* is used as a description of busy but everyday work situations. Considering the Danish obsession with time, it is no surprise that stress is more commonly understood as an indicator of success in everyday life and a general state of society than as a health issue.
- Leisure time has become a commodity commonly thought to be heavily in demand and in limited supply.

Implications

- Keep your promises and be on time.
- People participating in qualitative research are usually on time and they expect researchers to be timely too.
- People participating in qualitative research have taken time out of an often tight schedule to participate. Therefore, they are usually very eager to participate and express their opinions.

Strict timekeeping: Working parents, busy families



Facts

- Like in the other Scandinavian countries, a very high share of women are employed outside the home in Denmark.
- 73,7% of all women are active on the labour market, compared to 82,5% of all men.
- This means family life is structured around two careers.
- To support this general lifestyle, Denmark has a strong, partly state-funded day care system for children from 1-11 years.
- Families with young children will need to collect their children from day-care institutions around five o'clock in the afternoon.

Implications

- Time is precious - especially to families with young children.
- Research needs to work around these busy family schedules.
- It is difficult to conduct research before five o'clock in the evening.

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Value and price focused: Danish price consciousness



The sign reads:
Price War

Facts

- Danish consumers are excessively price-conscious and price-sensitive. Denmark is in many ways characterized by discount-consumerism.
- However, Danish consumers' quest for low prices should not be interpreted as a disregard for quality. Many consumers are equally conscious of quality and will pay more if value is perceived
- During focus group sessions price is always mentioned as an important driver or barrier, regardless of income. This is especially the case when it comes to FMCG.
- As a testimony to Danish consumers' 'hawker-mentality', discount supermarkets like Netto, Fakta, Aldi and Lidl have significant success.



Focus on value: “Gourmet” consumerism



Facts

- Danes’ price consciousness does not preclude paying price premiums where true value is perceived – e.g. “gourmet” consumerism or the popularity of gourmet / organic food and drink
- Gourmet consumers choose quality over quantity. Gourmet consumerism is a trend found among groups of consumers with medium to high incomes.
- One example of gourmet consumerism is beer. The beer of choice is not just an ordinary Carlsberg, but preferably something out of the ordinary like a Belgian Westvleteren.
- Danish micro-breweries have had huge success the last 5 years. Considering Danes’ love for everything small, the fact that these breweries are ‘micro’ is in itself regarded as a seal of quality.

Implications

- Discount and Gourmet consumerism are often trends that go hand-in-hand e.g. people shopping in discount supermarkets most of the week, and turning into gourmet consumers during the weekends.

Danish design: Form and function



Facts

- Danes' expectations about quality are encapsulated by Danish Design
- The core element in Danish Design is the combination of aesthetics and functionality. Aesthetics means not only form, but also material, texture and durability.

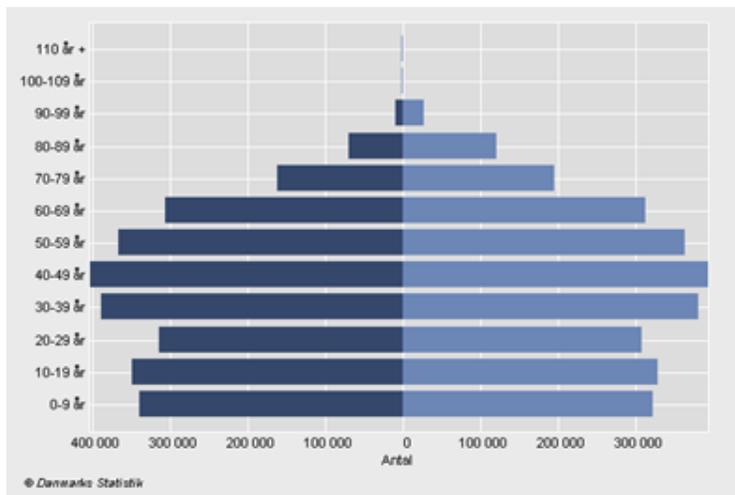
Implications

- A quick look back at Naipaul's harsh diagnosis underlines how the Danes have grown accustomed to high quality design and durable products.
- This should be considered when launching new products in the Danish market.

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Contemporary trends: An aging population



Facts

- Birth rates are dropping and life expectancies are increasing. This makes the population grow older overall.
- In the future, there is worry that fewer hands will have to support a large group of seniors through the income tax-supported welfare system.
- Exponential growths in real estate prices make young professionals financially vulnerable and has dramatically increased the equity among senior property owners, further increasing the pressure on the younger generations.
- Many retire when they turn 60 and have many active years in front of them as they leave the labor market.

Implications

- Senior generations are more interesting consumers than ever.



**Section II:
Implications for
research**

Implications for research in Denmark

Bear in mind that...

- Denmark is a small country with an ambiguous history and mentality
- Danes are first and foremost informal people
- Research settings should be informal, comfortable and relaxed
- Danes may appear rude and overly critical to products
- Time is precious
- Focus groups should run no sooner than five o'clock
- Danes are on time and expect punctuality
- Danes tend to over-focus on price, but at the same time they are aware of quality
- Senior citizens form more interesting consumer segments than ever
- Danes have high standards when it comes to design

Bringing lifetolife



Thank you