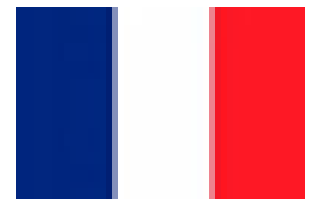


Synovate Hotspots France





Bringing
France
to life



Bringing France life to life

- This document is designed to give you an overview of France, 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.
- Our discussion has two main parts:
 - "Big Ideas": insights into French culture and consumers
 - Implications for research

Country demographics: Some figures

- Total population: 65 million
- Area: 675 000 km², including overseas territories.
Equivalent: California
- Official language: French, with a large variety of accents
- Average personal income: 31 000 dollars
- Top 4 cities and populations:
 - Paris, 2 000 000; "Grand Paris": above 11 million
 - Lyon, 1 600 000
 - Marseille, 1 500 000
 - Lille, 1 100 000
- Religion:
 - Catholics: 65%
 - Agnostics or atheists: 25%
 - Muslims: 6%
 - Others: 3%



Demographic trends: More babies, more elderly

- Since 2000, France's birth rate has led the rest of Europe
- 2008 birth rate: **2,02 children/woman**, tied with Ireland for the highest birth rate in Europe
 - This high birth rate is partly due to government incentives (universal, full-time preschool starting at age three; subsidized daycare before age three...), as 80 % of women work outside home
- At the same time, the population aged 55 and over is **growing** (they make up 29 % of the French population in 2008).
- The senior population has an average purchasing power 19 % higher than the younger population → **an important and growing market**, which is only beginning to be targeted specifically.



Demographic trends: Changes to household / family structure

The traditional family structure (a married couple with children) is not the only "norm" anymore.

A growing number of:

- people living alone
- couples without children
- single parent families
- blended families

→ Today more than half of all households are made up of 1 or 2 persons, which is having important consequences for consumption habits.

Top 10 brands

- Danone (vive le marketing fort)
- Nutella
- TGV
- Sony
- Décathlon
- Evian
- Fnac
- Google
- Ikea
- Lindt



nutella



SONY

DECATHLON



Google





Section I: Big Ideas

Bringing France to life: “Big Ideas”

Insights into French culture and consumers

- Remembrance of Things Past: While many countries are proud of their history, the French have a particular reverence for France’s role in history and cultural patrimony. The strong desire to protect and preserve their heritage is a major theme in French life.
- Food Glorious Food: Saying that the French are obsessed with food is an understatement...French food is a cornerstone of national identity and daily life.
- The Land of Luxury: the French value beauty highly – sometimes putting form over function – but don’t confuse a love of elegance with a focus on money.
- Which France?: Paris is the centre of France but the ways of life in France vary greatly across the country.
- Everybody is a Critic: the French don’t hesitate to voice their opinions and their critical perspective can be a hard one for marketers’ to crack.

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Remembrance of things past: French history and language

- For the French, feelings of national pride and nostalgic longing for a great and prestigious past are extremely strong.
- The French consider themselves **the inventors of freedom and human rights** (the French Revolution of 1789 is seen as the key event in the national history); they still believe it is their mission to spread those values around the world...That's one of the factors behind their perceived arrogance.
- **The French are also very proud of their language which used to be the official language of diplomacy**, and which is still seen as the language of poetry and love.
 - This helps to explain not only the reluctance to integrate English words in everyday language, but also the lack of interest in learning other languages or even to get rid of their typical French accent (to which they are attached as foreign people find it sexy!)
 - **Numerous official policies aim to preserve the French language, e.g.** French radios must dedicate at least 40% of their popular music programs to French-speaking music, all English taglines in commercials must be translated into French.



Remembrance of things past: Architecture and art

- The French people's reverence for the past and pride in their cultural background also leads them to aggressively protect their artistic and architectural legacies
- **Paris and its architecture** are a monumental expression of this protection of cultural patrimony: **the city's architecture was designed in the 19th century – and is preserved as such in most neighbourhoods.**
 - Until recently, the "31 meter" rule forbade the construction of buildings above that height in the major part of Paris.
The typical facades from this time – called "Haussmann" – are the typical Parisian style, and it did not evolve a lot since then.
- Another example of the French's strong relationship to their past which was much debated in the media: in 2008 Jeff Koons displayed some of his works in the Chateau de Versailles. Charles-Emmanuel de Bourbon-Parme, the alleged kings of France's descendant, sued the Ministry of Culture and asked for the exhibition to be closed. According to him, the exhibition was a "profanation" and "pornographic". The alleged prince lost his trial ... and the exhibition went on.



"Haussmann" facade, Paris



Jeff Koons in Versailles, 2008

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Food glorious food: In France, food is sacred...

- **Do you know how French tourists recognize each other when they travel abroad?**
They are the ones spontaneously thinking and talking about FOOD! One is going to mention his roots in Perigord and evoke the excellent 'Foie Gras' he has discovered on the Bergerac market the week before... whereas the other is going to give you the address of the very best 'patisserie' in a small village in Provence where they prepare the most outstanding Meringues you have ever tasted in your life!
- **Part of the reverence for food is related to the reverence for the past and tradition: Ancestral food-making methods persist, especially for bread and cheese, which are central to the French identity.**
 - Although bread consumption decreased during the last century, France is still one of the countries in the world where the role of industrial bakeries remains low – artisanal or small-scale bakeries still account for 80% of total bread production.
- **Food is part of French culture and therefore sacred!**



Food glorious food: The table as community

- For the French, eating is intimately connected with (if not indistinguishable from) society and community
- Eating is intimately linked with social bonding and sharing, and to the pleasure of being with friends or family.
- It was telling to hear a French guy one day who was in New York answer the question : What did you have for lunch today?

'Nothing ! I didn't have time to eat, I just had a sandwich that I ate on the go !'

➔ **It's more than the food -- Pleasure, conviviality and taking time with friends or colleagues are key to food culture in France!**



Food glorious food: Growing awareness of health aspects

- **Healthy eating is today at the forefront of consumers' minds**
→ growing success of organic food and traditionally cooked “like homemade” food
- **A recent national health campaign has massively communicated nutritional messages**, recommending for example « eating 5 portions of fruits and vegetables per day, and to eat fish at least twice a week » and to practice sport regularly. Those messages are very well-known today in France.
- **Recent laws aim at fighting children obesity** (eg. the sale of sugary beverages and chocolate bars is banned from schools)



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Land of luxury: France's role in the luxury goods business

France has a centuries-long history in the luxury goods sector:
textiles, leather, fashion, perfume, crystal and ceramic, jewelry, fine
food and wine



Land of luxury: The impact on the everyday consumer

- France's association with luxury has had real impact on the French consumer as well as occasionally mis-directing marketing:
- There is a real French fascination with **fashion / beauty / elegance** (helping form to sometimes trump functionality)
- **The cliché of the beautiful, slim French woman, however, can be mis-leading** -- while the image of the worldly, chic French woman permeates ads and films not to mention numerous books by foreigners...in reality many French women do not relate to this mythical image... even if they feel flattered by this cliché!



French actress
Sophie Marceau

A tradition of luxury ... but not a money-oriented culture

- **While the French can be seen to value luxury and beauty, there remains a pervasive distrust of wealth and distaste for discussing money.**
- **Some of this may derive from France's Catholic culture:** making a lot of money has been perceived as a sin for centuries. Today, money is still a taboo in France, and **wealth still raises distrust and sometimes disapproval**. As Jacques Séguéla, chief creative officer for Havas (ad agency) said: «To us money implies corruption».
eg. - critics of President Sarkozy showing its Rolex watch during a TV interview or celebrating his election on a friend's yacht in Malta;
- an American will feel free to talk about how much he earns, but a Frenchman will find it inappropriate and vulgar.
- **Implications for marketing and advertising:**
The money taboo applies to advertising culture. Title of a 2009 NY Times article: «In France ads aim at heart, not wallet».

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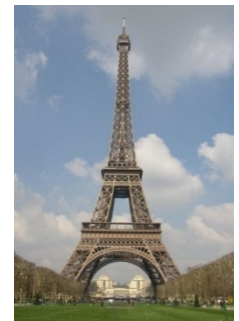
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Which France?: City vs. village, North vs. South

Though France remains very centralized around Paris, the **ways of life of French people remain very different** across the country:

- **Regional specificities remain strong**, in particular differences between the North and the South, with Mediterranean ways of life along the coast.
- **The French are very attached to their region.** The French film called “Les Ch’tis” (name given to French people living in the North) was a huge hit in 2008: it tells the story of a man who lives in the South of France and who is completely depressed when he learns that his job has been transferred to the North.
- **Urban criteria:** there are huge disparities in consumer behavior between big cities and small towns/rural zones. Paris is the bellwether of big towns’ mindset and imposes specific codes and behaviors / attitudes. This creates a huge cultural gap between downtown people and those living in the suburbs, generating social discriminations.



Which France?:

Socio-economic divides and generation gaps



- **Beyond regional differences...France exhibits a great deal of socio-economic diversity as well as distinct generation gaps.** Thus you may hear about the 'Beauf' (middle class, rude, with a low education), the 'Prolo' (worker, poor) or the 'Bobo' (hipster).
- **Language has also become emblematic of these social differences. In particular marketers need to be aware of the gap between the French "noble" language and the language of youth, particularly of young people living in the suburbs.** They have a strong accent, and they create their own words, a mix of French and of the different languages of immigrants. They also speak in Verlen which consists in inverting the order of syllables:
 - C'est un truc de **ouf** (< **fou**) : That's so crazy!
 - C'est la **meuf** de Pierre (< **femme**) : It's Pierre's girlfriend.
- Young people – also including young adults – like using a little bit of those expressions because it makes them feel hip! A famous singer, Renaud, uses Verlen as well in his songs.
- **Movies which show the social/cultural gaps existing in France have recently had a great success in France.** Eg. "Entre les murs" ("The Class"), which has been awarded the Palme d'Or of the 2008 Cannes Film Festival.



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Everybody's a critic: Criticizing, demonstrating and going on strike



- **The French like criticizing: according to them, it is an essential expression of their freedom of thought.** Commenting and criticizing political decisions is an everyday habit. The French are usually critical towards advertising as well, which they tend to perceive as manipulation



- **A subversive people:** since the French Revolution, protest on the street has played a huge role in the French history: it has been the cause of different changes of regime. **Demonstrations** have become a national sport: on Saturday afternoon, it's not rare to see at least one demonstration in Paris! Moreover the **strikes** are still a usual means of social protest. **This illustrates a French paradox: a real culture of freedom and protest, but a strong resistance to change.**



Section II: Implications for research

Implications for qualitative research in France

- In France, focus groups never take place in the suburbs, but in the city centers, as people living downtown would never go in the suburbs.
- Be aware that French participants tend to be more critical than in other countries.
- Check that there is no national strike or at least no transportation strike on the day you're organizing focus groups in France!

Launching products in France

- Even if French people are very attached to their language, taglines in English are not necessarily a purchase barrier. On the contrary they are much appreciated by young French consumers, as they sound fashionable to them.
- Importance to take into account local peculiarities as certain products consumption or cultural features may strongly differ from one region to another.
- France is not (only) PARIS !



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Thank you