

Synovate Hotspots Greece



lifetolife



Bringing
Greece
to life



Bringing Greece to life

- This document is designed to give you an overview of Greece, 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 Greece culture and consumers
 - Implications for research

Background: Demographics

- Total Population: 11.140.460
- Top 4 cities and populations:
 - Athens (the capital): 3.7 million
 - Thessaloniki : 800.764
 - Patrai : 185.668
 - Iraklion: 144.642
- Ethnic mix: 98% Greeks, 2% Turks, Albanians, Slavs and others
- Age profile:
 - Under 25: 29.4%
 - 25 – 50: 36.5%
 - 50+ : 33.9%
- Average household income/ expenditure:
 - National: Euros 7.897 per capita



IMPORTANT NOTE:

Having stated some numbers regarding Greek reality, it needs to be pointed out that: retrieving statistical data in Greece for Greece is a hard task to do. The National Public Statistic Organisation most often fails to be up to date, so other sources need to be found (better private companies).

Background: Top 10 brands

1. Coca Cola (Soft Drinks)
2. Shell (Petrol)
3. Nike (Sports)
4. Nokia (Mobile Phone)
5. Marlboro (Tobacco)
6. Amstel (Beers)
7. Pampers (baby care)
8. Amita (fruit juice)
9. Xerox (Digital Technology)
10. Fage (dairy products)





Section I: Big Ideas

Bringing Greece to life: “Big Ideas”

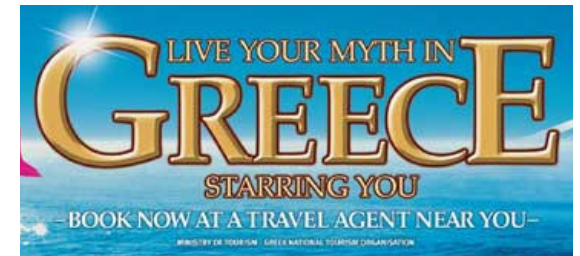
- Greek Life - Not a Greek Vacation: While Greece evokes images of lazy sun-filled days by brilliant blue waters...the reality of life in Greece is much more hectic and even stressful.
- Cultural Crossroads: Greek culture is a unique mix of Eastern and Western influences and Greek consumer preferences reflect this.
- Mediterranean Meals: Enjoying good food and drink with friends and family is a central part of Greek life.
- Late Nights and Al Fresco Leisure: Greeks party hard (and late into the night) during the week...but come the weekend or the summer holidays and the great outdoors is the only place they want to be.
- Metro Media: The Athens Metro is not only introducing many Greeks to the joys of high quality public transportation, it is creating new and important media channels that influence a broad swathe of consumers.

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Greek life.. Not a Greek vacation

- The stereotype: Live your Myth in Greece. When most people think of Greece they think summer, fun in the sun and ...'loving feelings'
- In reality, life in Greece can be quite stressful.
 - Greeks have some of the longest work weeks in all of Europe. Working hours per week are of the highest in Europe, with the official number being 40 hrs per week, but unofficially at least 50 hrs per week.
 - It is common for a Greek to hold more than one job.
 - Greeks today face a much more difficult economic situation than their parents and it is now common to use personal debt to maintain niceties like family holidays and Christmas presents



Greek life does not live up to its laid-back stereotype...especially for 'generation €700'

- **'Generation €700'** is the silent majority of young Greeks, aged between 25 and 35, who are overworked, underpaid, debt ridden and insecure.
- They have finished university, got a Master's degree (most of them in good universities abroad), speak 3 languages & are experts in pc... and having returned to Greece they get their first jobs. They **work 10-12 hrs per day getting paid... €700**.
- They **live with their parents** as they cannot afford to live on their own (a descent flat costs 350-400 euros per month).
- There is the first generation that **faces the possibility of living in lower standards than its parentage**. Although, their families have spent a lot of money to provide them a bright future (studies) yet they face social and financial uncertainty.
- You want to talk to the young adults in Greece? Are you sure they are your target customer? **Do they have the space, the time or the money for your brand?**
- And very importantly, do you know **where to find them at night?**



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Cultural crossroads:

A long history of merging East with West

- Because of its physical proximity to both Europe and Asia, Greece has been at a cultural crossroad for centuries.
- Since ancient times, Greece has absorbed influences from Balkan, Eastern and Western civilizations, creating **a unique and very interesting cultural mix with one common national identity.**
- Greeks are always facing the question of whether they are Westerners or Easterners and choosing what is more favourable for them at the moment.
- The Greek predilection for accepting foreign influences has meant that the definition of “local flavour” is constantly shifting.



Cultural crossroads: Increasingly multicultural Greece

- Greece's history of integrating various cultural influences looks to continue as **Greece has accepted large numbers of immigrants over the past decade** from all over the world
- **Almost 1 million immigrants** live and work permanently all over Greece.
- In Athens there is significant ethnic diversity which contributes to the capital's cosmopolitan feel
- Despite initial fear of immigration, Greeks have come to accept and even embrace this multiculturalism.
- There is **a great opportunity for marketing** that speaks to immigrants. Big companies have already started to conduct immigrant focused research.



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Mediterranean meals:

A cornerstone of Greek culture

- The **love of quality food and wine** constitute an important element of Greek culture even from Ancient times.
- Greek cuisine combines a delicious mix of **fresh Mediterranean plates** such as salads and fish with **oriental flavours**.
- Yet even if the cuisine is not Greek...the atmosphere of the table will be distinctly Mediterranean, i.e. **open hearted, 'warm' & very expressive (touching a lot) and loud**.
- Greeks like to have leisurely meals and to eat at later hours than many other Europeans. . In general **lunch is around 14.00pm** while **dinner is no earlier than 21.00-21.30pm**.
- Greeks love to eat between meals and especially enjoy street foods both Greek and foreign: e.g. independent vendors in most big cities offer stewed chestnuts, corn & bagels.
- **Greece is a coffee culture**. There is a whole philosophy behind coffee. Greeks have coffee anytime in day or night & it lasts longer than it does elsewhere – check out at the national coffee 'the frappe' & compare with the Italian espresso.



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Greek leisure: late nights...

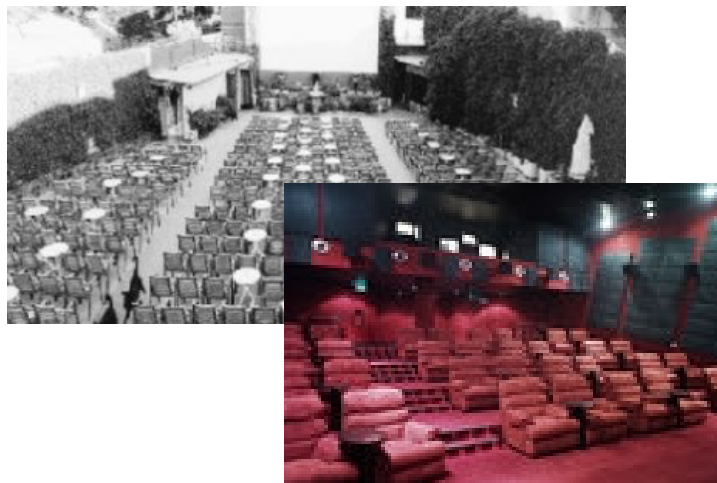
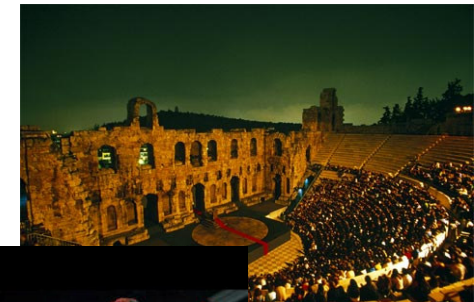
- Although their work lives can be demanding, Greeks love to entertain themselves and enjoy life to the fullest outside of the office.
- **Greeks go out when the rest of Europe goes to sleep** – restaurants & the streets become lively at around 10pm, while bars & clubs at 11-12pm. Closing time...when the sun rises.
- Greeks don't observe "school nights" -- **Going out on Monday & Tuesday is the new in thing.** Many artists break the Thursday/Friday rule and perform in the beginning of the week.
- **Live music performances** are extremely popular although Athens and even smaller cities thrive with different types of cultural and artistic events. There is a tremendous demand for music art and theatre from all over the world. **Concerts, ballet & operas** are performed all around the country, with small islands & the provinces enjoying the same access to culture as major cities.
- Younger people without the means to go out will gather in each other's homes at night enjoying themselves by sharing a drink, watching a movie, playing board games or playing music.



...and outdoor living

Especially in summer, leisure is pursued outdoors

- The weather, apart from influencing people's mood, also influences their habits & lifestyle. Outdoor life blooms during the summer in Greece. Oh! Please remember **summer in Greece starts in April and ends in October (!)**.
- One can visit an open air (ancient or contemporary) **theatres** which offer a unique experience that will never be forgotten.
- Greece is one of the few places in the world with open-air cinemas – where you can watch a film under the stars and sipping a cold beer. Their popularity has also led international multiplex cinemas to open open-air cinemas, e.g. Village cinemas



- On weekends or holidays or a big holiday come highways & ports are jammed with city people going...out of the city. for some fresh air. Many Athenians own 'summer or village houses' outside the city.

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Metro media:

Athens metro is changing more than transportation

- Athens Metro was a while coming but it has been love at first sight for Athenians. Beautiful, clean, on time and quick, it has set **new standards on what public transportation should be.**
- It has also set new standards for the press. The traditional **press became FREE PRESS**, as the AM published its own, freely distributed, newspaper, in November 2000.
- Since then, many new free press titles have been released. Some of them are highly **sophisticated and state-of-the-art publications**, that inform on the cultural events, fashion, lifestyle & contemporary issues in the city & very often become the **carriers of new trends.**
- Although, readership is not yet tracked, many brands decide to advertise in free publications as a **complimentary medium** to the traditional ones.
- Advertising within the metro wagons is also a current trend. With **1 million passengers' eyes daily on them**, no wonder. Bored commuters are ready to be captivated by creative ideas!





Section II: Implications for research

Implications for qualitative research in Greece

- When planning for groups always **allow at least one hour between** them. There is a general tendency for groups to start a bit later than scheduled as respondents may take their time to get to the premises. Therefore, chances are that the group will finish later than planned.
- It is usually **better to run groups in the afternoon**, after 17:00 o'clock if you need working people in the groups. Otherwise you will get only housewives & university students.
- **Mothers of babies are a particularly elusive sample**, since they tend to cancel at the last minute due to baby problems (Greek mothers are particularly anxious). Therefore, there is a lot of rescheduling and fieldwork can take quite longer than planned. This can be resolved by conducting in-depths at the mothers' homes.
- **Avoid the numerous religious & national holidays**. When they fall close to the weekend people arrange to leave town for a short holiday and then it becomes extremely difficult to find respondents to come to the group. There are also three major religious holidays during which the whole country moves at a slower pace, people go away on holidays and we refrain from research: Christmas holidays (and New Years' of course) in the last week of December & beginning of January, Easter holidays usually around April-May (the date for this holiday varies every year so it is necessary to check), and the 15th of August holiday that marks also people's summer holidays.
- Last but not least, **use the Metro** to get to the venue. Traffic can be lousy.

Implications for launching products in Greece

In order to launch successfully new products in Greece it is important to keep the following in mind...

- Respect & do not mock the national symbols of pride (isn't it the same in all countries)
- Avoid using ancient symbols (e.g. capital from ancient temples) because elsewhere may connote tradition, long standing value etc. but in Greece will be just perceived as...tacky!
- Be innovative and original – Greek is a saturated market in most of the categories and making a difference becomes more & more difficult
- ...conduct research only with Synovate Greece. They know Greeks better than anyone else!

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Thank you